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TACIT CULTURAL KNOWLEDGE: AN INSTRUMENTAL QUALITATIVE CASE
STUDY OF MIXED METHODS RESEARCH IN SOUTH AFRICA

by

Debra Rena Miller

A DISSERTATION

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TACIT CULTURAL KNOWLEDGE: AN INSTRUMENTAL QUALITATIVE CASE
STUDY OF MIXED METHODS RESEARCH IN SOUTH AFRICA

Debra Rena Miller, Ph.D.

University of Nebraska, 2015

Advisor: John W. Creswell

Notwithstanding the dramatic expansion of mixed methods research, research methodologies, methods, and findings are culturally situated. Problematically, studies conducted outside the global north often embrace canonical methodologies aimed at understanding concepts more explicit than tacit. Learning about the needs of researchers and participants in South Africa may bring to light taken-for-granted assumptions in Anglo-American orientations of mixed methods. Hence, the purpose of this study is to explore aspects of tacit cultural knowledge that contextualize mixed methods research in South Africa.

In-person interviews among South African professors as well as a corpus of books, sections, journal articles, and theses informed the study. Narrative, thematic, and discursive analysis served to naturalistically generalize themes of the case and to approach an integrated crystallization of findings across data sources. Findings showed that research methodology in South Africa serves as a means to an end and requires relational ethics. Relational aspects of life require communicatively embedded collaborative approaches with time for minimally structured talk and storytelling in and across data collection events. Mixed methods studies face challenges of hybrid languages and styles with even educated participants displaying multiple forms of literacies. To deal with these realities, qualitative approaches dominate across studies of all approaches and

in applications of mixed methods research. Whether asked by South African researchers or by external funders, research questions need to be contextually sensitive. Sensitive contexts require researchers to connect with both heart and mind in attempting to walk in participants' shoes. Tacit cultural knowledge involves methodologies as political identities that lead to economically based knowledge.

Recommendations for research in South Africa and beyond include allowing plans to flexibly change, basing approaches to ethics on unregimented trust, considering cultural expressions of doubt when probing, and implementing fewer studies to result in more meaningful data. Ultimately, this study contributes an overview of mixed methods research conducted in South Africa for researchers on the subcontinent, and contributes an understanding of how to handle extreme cultural contrasts within a given study for audiences in the global north and south.

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Dedication

As an aspiring postdisciplinarian, I dedicate this dissertation to the memory of Mary Dlamini and Janet A. Harkness. Mary Dlamini was a *sisi lomkhulu* or big sister to my siblings and me. I think of her as *make lomcani* or little mother, although I have learned in recent years that *little mother* has a different connotation in siSwati contexts than it has had for me. At any rate, Mary cared for my younger brother, my younger sister, and for me during our childhood years in Swaziland. Across the decades, generations of our families have intertwined. Before her death, shortly after I collected data for this dissertation, Mary was the person closest to the heart of my African self.

Janet Harkness was the former director of the University of Nebraska's Survey Research and Methodology program and modeled applications of linguistic anthropology to research methodology. Don Dillman, regents' professor at Washington State University, noted that no one had "done as much thinking as [Janet had] about cross-cultural surveys, and how measurement differs across languages and countries." To me, Janet modeled thorough reflection about the ways cultural and linguistic processes can and should inform methodological considerations.

I dedicate my dissertation to both Mary Dlamini and Janet Harkness because they represent the roots of my personal and methodological lives in a generation now gone before me. Each of them inspired me in ways I hope to inspire others. I want the passion Mary and Janet had for life to exude through this dissertation and through the interactions I have with those who are willing to contemplate methodological processes and consequences beyond a status quo.

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First and most importantly, I thank my participants—Brendon Barnes, Amanda Gouws, Yolandi Foster, and Xoliswa Mtose. You took time for me during a limited three-week period, even when doing so fulfilled none of your academic duties. You were each hospitable and humoured me by allowing me to speak my stew of English, Afrikaans, and isiZulu! I hope that in some way I have done justice to your voices, as well as to the broader voice of research methodology and mixed methods research in southern Africa. Without you, this dissertation would not exist.

With much gratitude for their hospitality while I made my home away from home with them in 2013, I thank long-term friends Vincent Banks and his wife. Vince helped to restore my rusty Afrikaans while I prepared institutional review forms. Family friends for multiple generations, Bhekumusa and Ncamsile Dlamini (son and daughter-in-law of Mary Dlamini, whom I mentioned on the dedication page) have continually inspired me to stretch my mind around African and American realities simultaneously. In a similar vein, Caleb and Daphne Mathebula have for decades helped me carry the essence of my Swazi self in confrontation with South African realities. Mazisi Ntuthuka, whom I met at development evaluation training in Ottawa, Canada in 2009, has attempted to move my barefoot Swazi identity toward the trans-hybrid reality of southern Africa in the 2010s.

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Michelle Howell Smith stands at the intersection of faculty, cohort, and personal relationships. I encountered her when a mutual fellow student said Michelle was looking for someone to read her dissertation. I thoroughly enjoyed reading Michelle's dissertation because it was my first encounter with a mixed methods dissertation and because Michelle was developing an instrument...a process near and dear to my heart. Michelle is now a research assistant professor at UNL's Nebraska Center for Research on Children, Youth, Families & Schools. At some point, Michelle decided that she owed me *big time*. I cannot thank her enough. She has spent endless hours on many occasions helping me find more linear writing styles, letting me cry on her shoulders, and serving as a formal debriefer for my interview and analysis processes. In the minimally defined process of a thickly qualitative study with long periods of time when I had no sense of a *right* direction, Michelle helped me find my short-term and long-term rudder. Michelle is the reason I have completed this dissertation process. *Thank you, Michelle!*

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CHAPTER 1: INTRODUCTION

Statement of the Problem

As a synthesis of qualitative and quantitative ideas, the movement of mixed methods research has expanded dramatically in the last 15 years (R. B. Johnson, Onwuegbuzie, & Turner, 2007), crossing disciplinary and national boundaries beyond its U.S. origins (Zhou & Creswell, 2012). Disciplinarily, authors have reported the embrace of mixed methods in such fields as health services (Plano Clark, 2010; Wisdom, Cavaleri, Onwuegbuzie, & Green, 2012), primary care (Creswell, Feters, & Ivankova, 2004), trauma research (Creswell & Zhang, 2009), psychology and counseling (Dures, Rumsey, Morris, & Gleeson, 2010; Plano Clark & Wang, 2010), family science (Plano Clark, Huddleston-Casas, Churchill, O'Neil Green, & Garrett, 2008), sociology (Pearce, 2012), and marketing and business research (Harrison & Riley, 2011; Hurmerinta & Nummela, 2011). Across the world, authors have conducted mixed methods studies in such countries as Canada (e.g., Ross, Poth, Donoff, & Humphries, 2009) , Mexico (e.g., Goldenberg et al., 2011), the United Kingdom (e.g., O'Cathain, Murphy, & Nicholl), Australia (e.g., Andrew & Halcomb, 2006) , China (e.g., Zhang, 2010) , Nigeria (e.g., Olabode Green, 2008), Tanzania (e.g., Chandler, 2009), Zambia (e.g., Tshuma, 2012), and South Africa (e.g., Ngulube, 2010) .

Mixed methods expansion notwithstanding, research methodologies, methods, and findings are culturally situated (Denzin, Lincoln, & Tuhiwai Smith, 2008; Pitts & Smith, 2007; Stanfield II, 2011b; Zuberi & Bonilla-Silva, 2008). Each society takes for granted its ways of doing things, such that tacit meanings are beyond question (Bourdieu, 1977). The question, then, is what goes unrecognized in the production of knowledge

(Grenfell & James, 2004). As researchers, we “take our own culture for granted” to an extent that we usually do not realize that “what we do is cultural” (Lapan, Quartaroli, & Riemer, 2012, p. 164). As such, I define *culture* as a set of beliefs that comes from our bones and that we take for granted (Eagleton, 2000).

People in positions of power prefer linear orthodoxy rather than dealing with hidden meanings. Arbitrary rules of classifying become apparent when people who have been dominated gain opportunity to dissipate social censorships. Knowledge is socially and politically constructed, resulting in the potential for new knowledge systems (Kuhn, 1996; Zegeye & Vambe, 2006). As Haraway (1997) indicated:

To make a difference in the world ... one must be in the action, be finite and dirty, not transcendent and clean. Knowledge-making technologies, including crafting subject positions and ways of inhabiting such positions, must be made relentlessly visible. (p. 36)

Tacit knowledge can involve transferring knowledge through personal interaction rather than through formulaic or instructive interaction (H. Collins, 2001a). It may be influenced by long-term social interaction, differing emphases on ways of doing things, feelings unaccompanied by words or images, unrecognized values that later become recognized, or unconscious and unrecognized knowledge. Tacit knowledge may pertain to relationships. Tacit collective knowledge arises when people from multiple cultural backgrounds interact. Understanding cultures requires understanding their tacit cultural knowledge (Narramore & Duvall, 1986) and the diversity within cultures. In research situations, beliefs based on past social heritage tacitly influence perceptions of knowledge.

Postmodern cultures are not pristine (Ang, 1996). Hybridity is pervasive and evasive, more a rule than an exception (Kraidy, 1999). Research ethics in transnational spaces is increasingly noisy (Stake & Rizvi, 2009). Difficulty defining a single culture for blurred social spaces leads to deep ethical issues, with past assumptions now less relevant. Processes for studying social inequalities that originate outside a research community are not clear-cut. Typical research values such as honesty, respect, keeping promises, and taking risks have different meanings and invoke differing levels of ethical significance across cultures. When considering what comprises proper and good research, researchers tend to adopt beliefs of their own cultures without considering those of highly differing or complex cultures. Research that neglects sensitivity to particular cultural contexts is more difficult to recognize than research that blatantly contradicts an accepted norm of a dominant culture (see Cox, Servátka, & Vadovic, 2012 regarding acts of omission and acts of commission).

The effects of methodological language segregate and subjugate (De Lisle, 2011). *Universalistic* assumptions arise from interpreting language meanings language independent of context (Bernstein, 1971). *Particularistic* assumptions arise from interpreting meanings contextually. Understanding words derives from experiencing realities that contextualizes those words. Conceptual aspects of science derive from a practical approach (van Leeuwen, 2008). The same scripts determine our ability to participate in and to represent social practices.

Perceived of knowledge are engraved with influences of colonialism (Epstein & Morrell, 2012). Fragmented knowledge characterizes globally northern practices of social science (Milhouse, 2001). Academic researchers learn, conduct research, and form

theories with the assumption that each person internally controls their own life (Kim, 2001). However, some domains of life cannot be known through scientific method (Harris, 1979). Popper and Kuhn valued dynamic aspects of scientific process, transformation of theoretical structures, clarity of history, and revolutionary aspects of science (Asante, 2001). Views outside Euro-America ask science to explain why its endeavors are necessary beyond a material or objective view (i.e., transcending to include a sense of spiritual essence, per Asante, 1984).

Problematically, thousands of research studies conducted outside the global west¹ each year are often expected to use canonical methodologies derived from mid-19th century Europe or mid-20th century United States (Alatas, 1996; see Luker, 2008 regarding canonical methodologies). These methodologies aim to understand concepts more explicit than tacit, I assert. Since the early 20th century when European researchers colonized methodologies in the United States, Anglo and American methodologies have colonized the world. Methodologies conceptualized in Anglo-America fail to account for the range of cultural experiences research participants encounter. Social research methods are not pristine practices (Luker, 2008). Although recent decades have brought decolonization in political realms, colonialism endures and does not end when colonizers

¹ The metaphors of global north/south, east/west, or center/periphery are relative rather than geographically literal (Slater, 1995). For this reason, and consistent with Parnell and Oldfield's (2014) representation of the global north and south, I represent such terms with lower case. In early chapters, I primarily refer to the *west* (loosely representing the United States, Canada, Europe, Australia, and New Zealand) due to familiarity. However, I shift toward *global north* and *global south* starting with the chapter on case contexts because the global *west* and *east* implicitly and problematically exclude the *south*.

withdraw from territories (Uddin, 2011). Unfortunately, research methodologies remain colonized (Tuhiwai Smith, 2012). In the United States in recent decades, many or most research studies involving participants of diverse backgrounds have implemented monocultural methods. The need is urgent and widespread for western academic research traditions to become more ideologically plural (Stanfield II, 2008). Studying broader cultural realms enlightens further possibilities for methodological relevance.

In summary, mixed methods is expanding globally with associated methodologies and findings culturally situated. A theoretical lens of *tacit knowledge* recognizes that what is perceived as knowledge gained through mixed methods is transferred through personal rather than formulaic or instructive interaction. Cultural aspects of knowledge contexts are not pristine and hybridity is pervasive. Language and its associated meaning is assumed independent of context, contrasting the reality that meanings are subjectively assumed through particular contexts. Colonialism has defined the perception of knowledge, leading to a paradigm in which studies outside the west use canonical methodologies derived from European-American traditions with emphasis on more explicit than tacit concepts. Academic research traditions urgently need to grasp and manifest ideological plurality.

Description of Mixed Methods Research

Whereas *qualitative* data collection is open-ended and allows participants to form their own responses, *quantitative* data collection is closed-ended and requires participants to choose from response options that a researcher has formulated (Creswell, 2014; Ridenour & Newman, 2008). *Mixed methods* approaches state philosophical assumptions, gather qualitative and quantitative data, analyze each type of data (consistently with its

own traditions, I suggest), integrate the two forms of data, and draw interpretations by combining the strengths of both data sets (Creswell & Plano Clark, 2011).

Greene (2007) viewed mixed methods as mixing mental models and beliefs and hence defined mixed methods as incorporating multiple philosophies, values, personal understandings, theories, methodologies, and approaches to gathering and analyzing data. Mixed methods theories give form and cohesion to, and broaden the possibilities of, long-standing applications of mixed methods. Nevertheless, social inquiry is vastly more complicated, organic, and contextual than is possible for any theory or methodology—including those that incorporate mixed methods—to decree.

Various writers have advanced ways of expanding mixed methods. Incorporating reflexivity into quantitative aspects could make the cultural construction of knowledge more explicit (Coyle & Williams, 2000). Rather than promoting homogeneity, recognizing differences in ontology (what exists), epistemology (a tacit “theory of knowledge” according to Carspecken, 1999, p. 133), and methodology (a purposeful set of research tools), as Harrits (2011) indicates, mixed methods has the potential to embrace participants’ diverse lives, as van Vuuren (2008) demonstrates. Because mixed methods “offers dialogic opportunities” for understanding social phenomena (Greene, 2012, p. 755), it provides a way to “avoid methodological ethnocentricity” (Ayalew, 2012, p. 133).

Much quantitative discourse dissociates findings from real-world contexts and neglects cultural context (Tashakkori & Teddlie, 2003b). By forcing researchers to confront contradiction, mixed methods may help account for cultural contexts (Coyle & Williams, 2000). However, distinguishing qualitative and quantitative methods does not

solve the problem of cultural distances (Moghaddam, Walker, & Harré, 2003). To capitalize on cultural explanations and to avoid prematurely normalizing across cultural boundaries, Green and Preston (2005) advised against unknowingly using formulaic approaches to mix methods.

For this study, I define mixed methods as the use of qualitative and quantitative approaches within a particular study, acknowledging that the borders between the two are sometimes fuzzy. Although definitions of mixed methods distinguish qualitative and quantitative approaches, I view qualitative and quantitative methods as more of a continuum than polar opposites (Ridenour & Newman, 2008). Similarly, I view qualitative methods themselves as comprising a continuum, as Ellingson (2009) described the metaphor of crystallization for considering corresponding validity. Consistent with the subjectivities of Afrocentric research that I will discuss in chapter four, I take a subjectivist approach to research of all approaches in believing that each person brings their own unique meaning to situations (Crotty, 1998).

Description of the African Research Context

Some hold a concrete view is that anyone “who can directly or indirectly trace his route to the African soil or [who has] characteristics of Africanity” is African (Ndubuisi, 2013, p. 223). However, I focus on a traditional African worldview generally referring to sub-Saharan Africa but not intending literal reference to every aspect of sub-continental geography. The idea of being African is a people-centered phenomenon in which material and spiritual are fused and in which dichotomies do not exist (Kaunda, 2015; Ndubuisi, 2013). When color is considered, traditional Africa is often associated with being black, although the *African* descriptor may also refer to unity in plurality (Ndubuisi, 2013).

Almost any conception of Africanity focuses on relationship and defines the self in terms of *being with* a community of *we*. Hence, people of Africa are *from people* in addition to *from place*. The interconnectedness of *Ubuntu* exemplifies the salience relationship, not in a unitary way that applies equally to each person even among black Africans, but in a general spirit (L. C. Theron & Phasha, 2015). Although I have and will speak of southern African hybridity and although a spirit of interrelatedness is waning relative to western socialization and the AIDS epidemic, understanding the thick strand of African nature that weaves through the sub-continent is important to understanding the South African context.

Keeping in mind that these descriptions relate to a metaphysical essence and not to individual people, I briefly present African circular thought, spiritual beliefs, philosophical thought, and several aspects of South Africa's cultural hybridity. Traditionally, everyday African thought has tended toward circular or back and forth retrieval from the past more than linear thinking, oral more than written communication, general patterns more than base-10 numeracy, and differences in self-conceptions (Chilisa, 2009; Zaslavsky, 1999). These differences lead to differing perceptions of research, voluntary ethics, and response styles (Barsdorf & Wassenaar, 2005; Kass et al., 2007). By providing discerning awareness from unwritten or less systematic codes of knowledge such as myths, legends, proverbs, and songs (Zegeye & Vambe, 2006), people of Africa have potential to shape what people elsewhere know. Within South Africa, belief systems are extremely heterogeneous, requiring researchers to simultaneously address traditional and contemporary thought. If mixed methods research is applied from

an Anglo-American perspective, learning about needs of researchers and participants in South Africa may not address this full range of thought.

African beliefs, I propose, present values that may increase the plurality of research methods in general and of mixed methods in particular. In African traditions, spirit and identity are intersubjective in that identity is shaped through community (Forster, 2010). Objectification is seen as denying spirit and degrading nature (Ani, 1994).

Within African philosophical thought, Afrocentricity pursues agency and action, while Africanity pursues being and identity (Asante, 2001). Afrocentricity moves toward a post-Eurocentric or post-western stance. In Africa's "cultural cocktail," cultural identities are not clear (Maqoma, 2011, p. 66). Because the composition of societies proceed faster than knowledge produced about those societies, and because studies of the continent are often relegated to anthropology and development, contemporary scholars (including those on the continent) pay insufficient attention to the originality of African complexity (Nchinda, 2002).

South African Research Context

Moving to South Africa specifically, I now explain why the country merits global attention as one of the world's most important *in vivo* laboratories (Soudien, 2012). South Africa has experienced the oppression of apartheid, accompanied by constructive and destructive responses (Nuttall & Coetzee, 1998). For these and reasons I will yet discuss, South Africa more than anywhere in the world gives pause to question the meaning of self-awareness and humanness (Soudien, 2012). Particularly, South Africa's context raises the question of what it means to enact the right to be fully recognized and to give

that right to others. These questions arise in South Africa with urgency and complexity seldom found in recent history.

Understanding the potential contribution of a South African-based methodological case study to other complex cultural contexts of research requires awareness of South Africa's mobile context. For many decades, gold, platinum, diamond and other mineral mines have caused men from across sub-Saharan Africa to migrate to and emigrate from South Africa, often temporarily and without their families (Adepoju, 2003). The recent and distant history of internal and external migration continually transforms cultural meaning. Therefore, South Africa's sociolinguistic reality is essentially mobile rather than located at a point in time, making culturally hybrid experiences more a norm than an exception (Dyers & Slemming, 2014; Strelitz, 2004). South Africa then exemplifies the description of race as an unstable category that has changed over time (see Pugliese, 2002), the social discourse of which is contingent on context and history. Contributing to the cultural cocktail, the breakdown of former distinctions between black townships and white cities has resulted in shifting signs of race, place, and class (Durrheim, Mtose, & Brown, 2011) as well as gender, sexual orientation, generation, religious orientation, and tensions between modernity and tradition. Given these entanglements, and with 11 official languages, South Africa is home to an epitome of contrasts across complex cultural identities.

Studying the case of mixed methods research in the unimaginably entangled space of South Africa may help globally northern researchers more fully understand discontinuities of extreme cultural diversity not accounted for by their current approaches. South Africa's unique polycultural reality (Maqoma, 2011), more complex

now than historically, provides a rare and fertile background against which to characterize the needs of research methodology and in which to study the spread of Anglo-American research methods.

Consider the effectiveness of western-conceived research methods in capturing the impact of fear and witchcraft on the southern African² AIDS epidemic (Ashforth, 2005). People who believe in witchcraft do not typically share opinions on such sensitive topics with strangers (Halperin & Heath, 2012). Research in southern Africa must directly confront the enormous role of fear and witchcraft in studying the AIDS epidemic, and in so doing must seek nontraditional ways of acquiring knowledge, outside the typical conception of research as *scientific* or *rigorous* (Tilly, 2006).

South African researchers are pressed from many sides. More than ever, South Africa is socially required to meet western expectations of knowledge production (Zegeye & Vambe, 2006). By rewarding universities for following northern expectations of publishing in journals addressing western academic audiences, South African administrative governance encourages dominant Anglo-American perspectives (see Muthayan, 2004). In contrast, university researchers are surrounded daily by contours of participants whose life experiences and generational heritage differ profoundly from those of western participants, leading to a western bias in studying constructs outside the west (Chilisa, 2005). In the present world economy, nonwestern jobs and livelihoods are based on learning and incorporating western ways. Thus, western formalities must loosen

² Although I bind my case by South Africa, historic migration has blended cultures such that South Africa has more in common with southern Africa than with the continent as a whole.

their structures and embrace nonwestern sociocultural ways of making knowledge (Bettany & Woodruffe-Burton, 2009).

Rationale for the Study

Research methodologies and methods need to consider the immense effect of cultural constructs on the results they obtain, and on participant feelings elicited by those methods. Several writers have asserted that research combining quantitative and qualitative methods (i.e., *mixed methods*, or *gemengde metodes* in Afrikaans) is particularly well suited for addressing cultural issues. These cultural issues include the intersection of psychology and context, complexity of cultural constructs, cultural competence, and meaning in cultural comparisons (Bartholomew & Brown, 2012; Karasz, 2011; Ortiz, Sosulski, & Sherwood, 2012; van de Vijver & Chasiotis, 2010). However, those of us who apply mixed methods research, as with broader social research methodologies, do well to account for cultural contexts that we naturally take for granted, remembering that we have the ability to help or to harm that which we create (C. W. Thomas, 1985).

This study takes a primarily conceptual perspective, informed by interpretations from a qualitative case study including semi-structured interviews and a corpus of South African mixed methods texts. In addition to personal experience, I consider formal and informal knowledge relative to the context of mixed methods in South Africa, and the nature of oral-based relative to written text-based traditions. I propose a framework for addressing concerns about tacit knowledge. Tacit knowledge (transferred through personal rather than formulaic or instructive interaction) influences the nature of *ability*

that methodologists transmit among themselves to researchers beyond their cognizance and particularly to the broad set of skills that mixed methods requires.

Purpose of the Study

The global–local nexus (Fine, Tuck, & Zeller-Berkman, 2007) necessarily involves considering local components of a global construct. Learning about the needs of researchers and participants in South Africa may bring to light taken-for-granted assumptions in culturally expanding Anglo-American orientations of mixed methods. Hence, the purpose of this study is to explore how tacit cultural aspects of knowledge production contextualize the central phenomenon of mixed methods research conducted in South Africa.

Research Questions

The central research question asks: *What hidden aspects of culture shape the use of mixed methods research in South Africa?* The subquestions include:

1. What is the general nature of social research in contemporary South Africa?
2. How do South African researchers define mixed methods?
3. How do South African researchers implement or need to implement mixed methods?
4. What sources of cultural knowledge influence South African mixed methods research?
5. How could South African cultural knowledge further contribute to mixed methods research?

Research Methods

The design of this study involves an instrumental qualitative case that may inform cases beyond South Africa. Broadly speaking, a qualitative approach is useful in a historically oral culture (Abdi, 2001) and in migration research (e.g. Sheridan & Storch, 2009). My qualitative case involves multiple embedded units of data collection, including interviews among mixed methods researchers and a of texts (Yin, 2009). A case study approach enabled research questions to focus on how researchers in South Africa implement mixed methods, on creating rival hypotheses of how mixed methods research may address cultural plurality, on the phenomenological context, and on situations I, as a researcher, had little control over. An explanatory approach to the South African case traced connections across cultural research contexts. A single instrumental case uniquely demonstrates applications of mixed methods research in South Africa's unusual combination of sociocultural history and languages. At the same time, given the high cultural plurality throughout much of the world (Rapport & Dawson, 1998), the instrumental nature of my study informed applications of mixed methods in other parts of the world (see Gerring, 2007, on generalizing case studies).

Data Sources and Analysis

Denzin and Lincoln (2011a) positioned qualitative research as “inherently multimethod” (p. 5). Accordingly, I embraced multiple sources of qualitative data by including a corpus of written texts and interview transcripts to consider both planned and spontaneous opinions. I defined the corpus of potential written texts as those whose first authors affiliate with institutions in South Africa and that reference “mixed methods” in English, or “gemengde metodes” in Afrikaans. Furthermore, these methodological

references must have described both qualitative (directly text-based) and quantitative (indirectly text-based or numerically based) data (Pope, Mays, & Popay, 2007). Potential interview participants were, at the time I conducted interviews in 2013, professors at South African universities who had authored mixed methods publications (journal articles, books, or book sections) or had supervised masters or doctoral mixed methods theses.

The corpus of written texts includes journal articles (peer-reviewed and otherwise), masters' and doctoral theses, and textbooks. I thematically analyze the corpus of written texts to identify and report patterns (Braun & Clarke, 2006). This process consists of identifying key methodological and cultural themes, theoretically coding latent and manifest themes, and aggregating the coded themes (Bernard & Ryan, 1998; Guest, MacQueen, & Namey, 2012).

Face-to-face interviews (each conducted mostly in English) elicited researchers' thoughts. Participants included four mixed methods authors or advisors from South African universities, including historically "black" universities (HBUs) and historically "white" universities (HWUs), as well as traditional and comprehensive institutions. A semi-structured interview protocol loosely guided the interview questions and sequence.

I discursively analyze interview transcripts based on Gee's (2014a) discourse analysis toolkit, particularly tools that pertain to filling in contexts not explicitly stated. This discursive analysis provides insight into speakers' implicit meanings and contextual influences. In addition to analyzing individual data sets, I metaphorically crystalized the various forms of data and analyses as a form of transformational validity that sought to combine an array of multidimensional angles and shapes (Ellingson, 2009).

Definitions and Terms

I present this glossary alphabetically, with methodological terms based on western definitions. A separate glossary of terms related to the global north and south appears in the chapter on contexts of South African mixed methods.

Advanced mixed methods designs add features to basic mixed methods designs, e.g., by embedding one strand in another; embedding a basic mixed methods design in a philosophical framework; or sequencing multiple qualitative, quantitative, or mixed methods studies (Creswell, 2014).

Basic mixed methods designs incorporate a single qualitative and a single quantitative strand sequentially or concurrently (Creswell, 2014).

A *case study* is in-depth inquiry into a single example or into an issue that the case illustrates (Creswell, 2013b).

A *corpus of written texts* exemplifies naturally occurring language, has both form and purpose, and may be as short as a few sentences or as long as a set of written texts (Hunston, 2002). A *corpus* includes all data a researcher collects for a study, in contrast with a *data set*, which is the particular data a researcher analyzes (Braun & Clarke, 2006).

Crystallization is a metaphor for a form of transformational validity that combines an infinite array of multidimensional angles and shapes, theoretically and from participant perspectives, for a more nuanced than a recipe-like approach to validity (Ellingson, 2009; Tracy, 2010).

Culture is a set of beliefs from our bones that we take for granted (Eagleton, 2000).

Epistemology is a tacit “theory of knowledge,” or how we know what we know (Carspecken, 1999, p. 21).

Instrumental case studies provide ways to further understand an issue more importantly than understanding the case itself (Stake, 2005).

Integrating mixed methods strands allows qualitative and quantitative phases to intersect at a level of design, data, or interpretation and involves mixing, connecting, interfacing, merging, or embedding data or interpretations from each strand (Creswell & Plano Clark, 2011).

Knowledge production is the co-configuration of science and societal processes (Knorr Cetina, 2009).

Methodologies are purposeful sets of research tools (e.g., ethnography) (Crotty, 1998).

Methods are research tools (e.g., interviews and thematic coding) (Crotty, 1998).

Mixed methods is an approach that states philosophical assumptions, gathering qualitative and quantitative data, integrating the two, and drawing interpretations by combining the strengths of both data sets (Creswell, 2014; Creswell & Plano Clark, 2011).

A *mixed methods strand* is a qualitative or quantitative sequence that states a question, collects and analyzes data, and interprets results (Creswell & Plano Clark, 2011).

Qualitative data is open-ended (Creswell, 2014).

Quantitative data is closed-ended (Creswell, 2014).

Tacit knowledge is knowledge transferred personally without formulaic or instructive interaction (H. Collins, 2001a).

Transactional approaches to *validity* assume that a fixed truth exists, and that applying certain techniques after conducting can ensure the rigor of the study (Cho & Trent, 2006).

Transformational approaches to *validity* assume that social experiences construct human perceptions of reality and that researchers cannot assure the rigor of data (Cho & Trent, 2006).

Triangulating is a metaphor for a form of transactional validity that involves corroborating or comparing multiple forms of data to confirm or disconfirm findings (e.g. Miles & Huberman, 1994).

Delimitations

The limitations of this study are as follows:

- The case is bounded by the space of South Africa.
- The South African case was purposefully selected because it exemplifies taken-for-granted assumptions in culturally expanding applications of Anglo-American orientations of mixed methods research.
- The case includes interviews with mixed methods authors or advisors from universities in South Africa.
- Each text within the corpus of the case mentions mixed methods and has a first author who affiliates with an institution in South Africa.

Significance of the Study

Audiences That Will Benefit From the Study

This study benefits those who conduct, consume, or participate in social or mixed methods research in South Africa or in social or mixed methods research more globally. Those who conduct or consume mixed methods research will be able to account for a broader range of participants' cultural and linguistic realities by incorporating suggestions that result from this study. Those who participate in mixed methods research will be able to trust that their voices have been more deeply heard.

Implications of the Study for Mixed Methods Research

Studying the case of research methodologies in South Africa (assuming for the sake of conversation that these lie outside the west) may allow globally northern researchers to consider the immense effect of cultural constructs on their choices of methodologies, on the results they obtain, and on how their chosen methods leave participants feeling. These cultural issues involve the intersection of psychological processes and context, complexity of cultural constructs, cultural competence, and meaning in cultural comparisons. Those of us who apply mixed methods research do well to account for cultural contexts that we take for granted, remembering that what we create has the ability to help or harm. This study may enable mixed methods researchers to better consider choices of methodologies, cultural influences on the results they obtain, and how their chosen methods leave participants feeling. More specifically, it suggests ways in which mixed methods researchers may more fully apply collaborative and community-based approaches to mixed methods research.

In conclusion, this study seeks to raise awareness of the cultural complexity of the 21st century world among globally northern mixed methods researchers and to address related methodological demands. Using the extreme case of South Africa to provide implications for the field of mixed methods, this study contributes an understanding of how globally northern researchers may better handle extreme cultural complexity.

Chapter Summary and Overview of Dissertation

I began this chapter by stating the problem of tacit cultural knowledge. After describing mixed methods research, I discussed the global flows of methodology. Next I discussed the African research context. I then provided a rationale for the study, stated the purpose, specified research questions, and defined key terms.

This dissertation includes the following chapters: introduction, conceptual framework (literature review), methods, South African context, findings (results), and discussion chapters. Chapter one introduced the background of the study. Chapter two, comparable to a literature review, provides a conceptual framework by describing the frameworks of researcher experience, theory, and mixed methods content. Chapter three describes the methods of this dissertation. Chapter four describes the broader African context and the more specific South African context of the methodological case study. Chapters five and six provide analysis and findings for interviews and the corpus of published texts respectively, and chapter seven discusses the meaning of the findings.

CHAPTER 2: CONCEPTUAL FRAMEWORK

In qualitative studies, the conceptual framework serves as the counterpart of quantitative literature reviews. In addition to the study's theoretical background, the conceptual framework includes relevant experiential knowledge (Maxwell, 2013). Accordingly, I present aspects of my formative life in South Africa, which guide this study. I then describe relevant aspects of subjective philosophy and the theoretical lens of tacit cultural knowledge. Finally, I focus on the theories and practice of mixed methods research as the content of my study. Creswell (2009) distinguished integrative frameworks, which focus on broad themes; theoretical frameworks, which focus on existing theory; and methodological frameworks, which focus on definitions and methods. My frameworks are mainly methodological with a strong theoretical component.

Framework of Researcher Experience

My life started in a rural U.S. home with American parents. When I was 10 months old, my family moved to Swaziland in southeast Africa. Fifteen of my 19 precollege years were spent in Swaziland and South Africa. Over the years, I acquired Afrikaans and isiZulu languages by immersion. My family returned to Indiana for three one-year furloughs, during which I struggled greatly. The U.S. school system was strange, clothing and peer attitudes were incomprehensible, and my parents' home church and extended family felt uncomfortable.

Early memories include a community of adult Swazi friends. One of my father's coworkers told my father he would wait for me to grow up so he could marry me. A Swazi woman worked in our home, as was customary, and became part of our family.

Her name was Mary, and she lived in a room on the side of our house. Mary saw to it that we were fed, that clothes were ironed, and that life without electricity proceeded as normally as possible (according to western expectations). To my siblings and me, Mary was a big sister or “little mother.”

When I was 13, we moved to Johannesburg in South Africa. What a rude awakening! “Black” people could not live next door to us. Life was bizarre, given my awareness that millions of black people lived in distant ghetto townships. I was not allowed to attend school with black South African students. On one occasion, a black woman travelled with my family to Swaziland. She feared for her life when she was unable to return to her township by sunset, and my mother insisted she sleep in my sister’s bedroom. The woman begged to sleep on the floor so no one would see her in the home of a white family. Through these experiences, I encountered South Africa from a vantage point that few white South Africans of my generation had.

Framework of Philosophical Orientation

My philosophical orientation is subjectivist in that I believe each person brings their own unique meaning to situations (Crotty, 1998). These subjectivist inclinations incorporate *verstehen* and perspectivity, insider and outsider perspectives respectively (Baur & Ernst, 2011). Subjective views may involve varying levels of consciousness including the unconscious unity of background understanding (Daanen & Sammut, 2012).

Meaning is significant to the extent it is shared by two people and insignificant to the extent it is not shared (Blumer, 2004). Less significant meaning is less conscious, and more significant meaning is more conscious (Daanen & Sammut, 2012). Cultural

practices habitualize meanings we take for granted. Less conscious thought contributes to the perspective of our reality.

Interobjectivity—sharing understanding of social reality within and between cultures—leads to intersubjectivity, or individual understandings of the world (Moghaddam, 2003). Intersubjectivity involves the ability to see from another person’s perspective and is more applicable when secondarily accounting for human understanding than when considering daily life (Daanen & Sammut, 2012). Intersubjectivity is not natural and occurs in situations that force the breakdown of assumptions between people or cultures. On a practical level, interobjectivity contributes greater attention to collective processes. Objectivity, then, represents “knowing how to act in everyday” situations (Daanen & Sammut, 2012, p. 568).

I recognize that neither ontological objectivity, which strives to see things the way they are, nor procedural objectivity, which strives to eliminate personal judgement, are possible (Eisner, 1992). As Sprague (1994) pointed out, epistemology creates ontology, or what we believe exists. The language and communication of research brings about what we perceive as the reality research uncovers.

Abstract (general) constructs are culture free, whereas concrete (specific) constructs are culture bound (Moghaddam et al., 2003). A *culture-free view* believes that knowledge or processes, such as research methods and methodologies, are universal (Mason, 2003). As a result, culture-free approaches to the humanities increasingly proximate hard sciences (S. Harding, 2006). In contrast, a *culture-bound* view believes that culture contextualizes knowledge or processes, such as research methods and

methodologies (Auer, 2009). Culture-bound approaches imply no one correct way to read the tools or results of research methods (Lather, 1992).

Based on the Gestalt directive, “the whole is more than the sum of its parts,” we as researchers need to study behavior in relationship to its context. We need to concern ourselves with our own cultural perspectives, perspectives of our methodological formation, participant cultural perspectives, and the phenomenon of interest. Research methods and methodologies “*are* cultural practices” (Baur & Ernst, 2011, p. 131), such that the perception that societies evolve determines their spread. Based on Crotty’s (1998) discussion, Figure 2.1 shows the relationship between my subjective epistemology, tacit cultural theory, case study methodology, and interview with corpus methods.

| | |
|---------------------|--|
| Epistemology | <ul style="list-style-type: none"> • A tacit theory about how we know what we think we know • e.g., subjectivism |
| Theory | <ul style="list-style-type: none"> • Justification of methodology & methods • e.g., tacit cultural knowledge |
| Methodology | <ul style="list-style-type: none"> • Purposeful set of tools • e.g., qualitative instrumental case study |
| Methods | <ul style="list-style-type: none"> • Tools • e.g., semi-structured interviews, corpus of texts |

Figure 2.1. Relationship of Epistemology to Research Methods

Framework of Tacit Cultural Knowledge Theory

My theoretical framework involves tacit aspects of knowledge that may, like an iceberg hidden beneath the surface of water, extend beyond its explicit aspects (H. Collins, 2010). For example, the instruction “Do not walk too close to people in the street” requires tacit knowledge to determine how close is too close. The first of two key characteristics of tacit knowledge is that no one can know all rules explicitly. Thus, each

person develops and applies tacit understanding of what is appropriate. The second key characteristic of tacit knowledge is that what is obvious in one situation is not in another.

Theoretically, I base my study on Collins' (2001a, 2001b, 2010) description of tacit knowledge as an ability transferred across researchers without presentation in diagrams or instructions (H. Collins, 2001a). This knowledge may be influenced by long-term social interaction, differing emphases on ways of doing things, feelings unaccompanied by words or images, unrecognized values that may later become recognized, or knowledge so deeply unconscious that it will not be recognized. In research situations, beliefs based on past social heritage tacitly contribute to what is perceived as knowledge.

Tacit knowledge may pertain to soma or relationships (H. Collins, 2010). I focus primarily on relational aspects. Deeply tacit collective knowledge involves the interaction of people from multiple cultural backgrounds. Of the five forms of knowledge passed by personal contact, the first intentionally conceals. The other four forms, which do not intentionally conceal, include: differing perceptions of what is important, knowledge that can be demonstrated but not verbalized, knowledge one person is aware of but another is not, and ability to provide meaningful knowledge without ability to indicate how.

Types of knowledge fall along multiple continua, including extent of local specification vs. regional generalization, formality or informality, degree of expertise, articulation or accessibility, and embeddedness in long-standing norms (Schwarz & Oyserman, 2001). Formal knowledge may relate to academic or scientific approaches, whereas colloquial knowledge may relate to natural and commonsense approaches (Fatnowna & Pickett, 2002). As institutionally conceived, socially responsive knowledge

is often enacted more procedurally than with implicit meaning (Ife, 1999). Knowledge is limited by its situations. *Knowledge production* is the co-configuration of science and societal processes (Knorr Cetina, 2009). Institutionalized knowledge production involves vocabularies and knowledge of power-holders that collide with knowledge of ordinary people (Zegeye & Vambe, 2006).

Conversely, commonsense, or traditional, knowledge is necessary to understand culture and to know not only *what* people do but *why* they think they do what they do (Hallen & Sodipo, 1997). Indigenous knowledge reduces tension between sacred and mundane by acknowledging a holistic human spirituality and rejecting the fragmentation of scientific knowledge (Fatnowna & Pickett, 2002). Cultural knowledge must be actively maintained or will be lost.

Western knowledge may view nonwestern knowledge as cross-disciplinary. In nonwestern cultures, boundaries between disciplines are less clear than in western cultures (Hallen & Sodipo, 1997). Studies that cross cultures accentuate related aspects of philosophy, psychology, sociology, and medical sciences. Throughout much of the African continent, knowledge involves belief in and philosophy of the revered master of medicine, referred to as a “witch doctor” or “native doctor” in the west. Given oral traditions, Africa’s elders comprise its libraries (Ki-Zerbo, 1990). Education systems are problematic, in that schools have been established with donor-stipulated conditions that neglect African culture, such as by having students recite *Rip van Winkle* (Brock-Utne, 2002). Standards labeled “international” are usually western-based. This theme recurs in nonwestern universities that expect faculty members to find donor support, usually originating in the west. Few African countries have attempted university instruction in an

indigenous language, and as of 2002, no universities in Africa offered instruction in an indigenous language. Without opportunities for a group of people to engage in dialogue in their first languages, traditional systems of thought are lost (Hallen & Sodipo, 1997).

Each society takes for granted its ways of doing things, such that tacit meanings are beyond question (Bourdieu, 1977). In the production of knowledge, what is misrecognized (Grenfell & James, 2004)? Defining culture as beliefs we take for granted and that come from our bones, we as researchers “take our own culture for granted” to an extent that we usually do not realize that “what we do is cultural” (Eagleton, 2000; Lapan et al., 2012, p. 164). Given this definition, understanding cultures requires learning about their internal diversity. Importantly, we need to ask whether, as researchers, we have the cultural knowledge to appropriately interpret and validate the lives of participants whose backgrounds differ from our own (Milner IV, 2007). One way to bring this tacit cultural knowledge to light is to attempt “to make the strange familiar” and “to make the familiar strange” (Riemer, 2012, p. 164). By making South African research more familiar, this study attempts to make globally northern mixed methods strange.

As Winkle-Wagner (2010) said, “applying cultural capital to qualitative work requires [defining] the field of study and [inquiring] into a participant’s cultural knowledge, competencies, skills or abilities” (p. 96). Mixed methods work requires the same. Communities of practice, such as research methodologists and mixed methods researchers, comprise knowledge societies (Anderson, 2008). The gap in cultural divergence between what people in a knowledge society need to know to succeed and what higher education currently offers is widening (O'Hara, 2007). I propose that this gap also relates to research methodology offered in higher education. Addressing the gap

requires revolutionary change. Appropriately preparing people to flourish “in the global knowledge society” requires changes in modes of inquiry (p. 930).

Tacit cultural knowledge significantly mediates emotions and related life practices (Kitayama & Masuda, 1995). Just as allowing tacit cultural knowledge to surface improves the practice of specific disciplines (such as psychiatry, per Kirmayer, 2001), so it benefits knowledge management (Mason, 2003). Knowledge management systems may encounter direct or indirect tangible benefits in acknowledging and encouraging tacit cultural knowledge to surface. Indirect benefits include collaboration and synthesis of such knowledge and require learning and integrating knowledge. Tacit cultural knowledge affects not only a person’s knowledge base, but also their ways of learning new concepts (Mason, 2003). It plays a role in processes of research methodology (Winkle-Wagner, 2010). Accordingly, I assert that tacit cultural knowledge also plays a role in processes of mixed methods research. Ignoring the cultural backgrounds of researchers and participants compares with implicitly engaging a culture-free view that believes research methods and methodologies are universal (Mason, 2003). In contrast, a culture-bound view believes that people adapt what they do to suit their cultural context or environment.

In social science contexts, evidence tends to be viewed in one of two ways. Evidence is seen either as instrumental or conceptual to making a decision, in that working knowledge of the situation at hand informs interpretation of evidence (Short & Palmer, 2008). Focusing on tacit knowledge takes a more conceptual than instrumental view of research evidence.

Some cultures are so broad as to be unbounded by space (Knorr Cetina, 2007). Epistemic cultures such as contexts of knowledge, relate to the inner process of “creating and warranting knowledge” (p. 363). Accordingly, studying tacit cultural knowledge is tantamount to studying tacit epistemic culture.

Framework of Methodological Content

Within my methodological framework, I use a qualitative case study approach to focus on theories, designs, and practices of mixed methods as content. I define *methods* as research tools and *methodologies* as purposeful sets of research tools (Crotty, 1998). My methodological quest presupposes that the relationship between theory and methods does not directly exclude one based on the other and that no method is inherently appropriate or inappropriate (Baur & Ernst, 2011). Rather, appropriateness of methods and methodologies relates our researcher awareness of how own our epistemological beliefs inhibit or support the nature of knowledge we integrate and to the (often cultural) contexts at hand (Schwarz & Oyserman, 2001). The benefits of mixing methods also depend on the researcher’s professional orientation (Bamberger, 2000).

Research, whether labeled *qualitative*, *quantitative*, *mixed*, or otherwise, involves cycles of conceptualization and of implementation (J. L. Green & Chandler, 1990). In qualitative studies, conceptualization involves contexts of purpose, discovery, and presentation. In quantitative studies, conceptualization involves constructs, indicators, variables, and interpretation (Hox, 1997). Ideally, studies define implementation as tools or processes within the contexts or conceptualizations of use (J. L. Green & Chandler, 1990). I assert that implementation tools are methods and that conceptualizations are

methodologies. My study looks at how tacit and contextualized knowledge flows across research methods and methodology, including mixed methods in particular.

Mixed Methods Research

As Anglo-American literature describes, mixed methods research states philosophical assumptions, gathers qualitative and quantitative data consistent with intended analysis, integrates the two forms of data, and draws interpretations by combining the strengths of both data sets (Creswell, 2014; Creswell & Plano Clark, 2011). Greene (2007) viewed mixed methods as mixing mental models and beliefs, and defined mixed methods as involving multiple philosophies and values, theories, personal understandings, methodologies, and approaches to gathering and analyzing data. The purpose of mixed methods theories is to give form to and broaden the possibilities of long-standing applications of mixing methods. Social inquiry is vastly more complicated, organic, and contextual than any theory or methodology, including mixed methodology, can decree.

Although I use the term *mixed methods* for consistency with western literature, I acknowledge that the broader scope of mixed methods does and should involve “mixed methodology,” including the purpose of mixing methods. For the sake of this conceptual framework, I discuss mixed methods as described in Anglo-American traditions and will discuss traditions on the African continent in the discussion chapter. In this study, I describe mixed methods as using qualitative and quantitative methods, acknowledging that the borders between them may be fuzzy.

Formal conceptualization of mixed methods research can be seen as having disseminated from the Anglo-Americas to many parts of the world (Creswell, 2010;

Creswell & Plano Clark, 2011). Various writers have advanced possible ways to expand mixed methods. Green and Preston (2005) have advised against unknowingly formulaic approaches to mixed methods to avoid prematurely normalizing across cultural boundaries. For example, incorporating reflexivity into quantitative aspects requires that researchers consider the political impact of their position and attempt to make the cultural construction of knowledge explicit (Coyle & Williams, 2000).

My personal orientation toward mixed methods relates to a flexible continuum between qualitative and quantitative approaches as dichotomous heuristics, as Ridenour and Newman (2008) describe. I appreciate the emphasis of these authors on differing ways of knowing and the relationship of validity to Kvale's (1995) idea of social and communicative constructions, an idea which held that the validity of knowledge is argued in dialogue.

Conceptual Aspects of Mixed Methods Studies

Research heuristically involves conceptual, experiential, and inferential stages (Nastasi, Hitchcock, & Brown, 2010). Mixed methods is typically thought to include distinct qualitative and quantitative *strands*, each of which states a question, collects and analyzes data, and interprets results (Creswell & Plano Clark, 2011). I first discuss stages for mixed methods studies as a whole and then discuss stages for each strand. For a mixed methods study as a whole, the conceptual stage involves acknowledging epistemological and theoretical foundations, the purpose of the study, and related research questions (Nastasi et al., 2010).

Mixed methods research questions. Ideally, the overall (central) research question determines the methods of a study (Plano Clark & Badiee, 2010) and should be

identified before considering whether a study will mix methods. The central question implicitly or explicitly connects content area and methodology and connects more and less structured (“qualitative” and “quantitative”) components (Plano Clark & Badiee, 2010; Tashakkori & Creswell, 2007).

Relationship across strands. Designs of mixed methods studies are often categorized according to design typologies, typically related to the purpose, priority, and concurrent or sequential timing of collecting data. Basic designs are easier to comprehend, but in reality studies are often complex or advanced.

Basic designs involve a concurrent or a sequential format. One way of distinguishing strands is by priority or relative importance of each strand (Creswell & Plano Clark, 2011). Convergent designs hypothetically collect both forms of data in a similar time frame but merge data sets from each strand to compare results from strands with corresponding priority (Creswell, 2014). In a sequential mixed methods design, one strand follows the other, with one taking priority over the other. In explanatory sequential designs, the qualitative follows and explains the quantitative strand. In exploratory sequential designs, the qualitative precedes and builds to the quantitative strand.

Advanced designs commonly embed a less structured strand in a more structured strand to serve such purposes as intervention (Creswell, 2014). Some researchers situate basic mixed methods design in a transformative framework, as Mertens (2015) advanced. Alternatively, multistage advanced designs involve multiple studies across time for sustained inquiry, with a qualitative, quantitative, or mixed methods approach comprising each study (Creswell, 2014).

Integrating strands. Integrating mixed methods strands allows qualitative and quantitative phases to intersect at a level of design, data, or interpretation (Creswell, 2014; Creswell & Plano Clark, 2011). This can happen in several ways with different labels, such as *mixing*, *connecting*, *point of interface*, *merging*, or *embedding*. Strands may connect at any of several stages in the mixed methods process. Integrating through design may involve embedding data, using a theoretical framework, or mixing through the framework of a program objective. Mixing actual data sets after data collection often involves sequentially building from one type of strand to another, such as by identifying research questions, selecting participants, or developing an instrument. Integrating during data analysis involves analyzing each strand in a way intrinsic to the approach through which data were collected, followed by converting or transforming one form of data to another, as in qualitzing quantitative data (Hesse-Biber, 2010; Onwuegbuzie, Freis, Leech, & Collins, 2011). Integration during interpretation occurs by drawing conclusions or making inferences based on both forms of data after the data for each strand has been collected and analyzed (Creswell & Plano Clark, 2011).

Design development. Regardless of whether a study follows sequential or concurrent mixed methods timing, or whether it is monomethod with only a “qualitative” or “quantitative” strand, the ultimate design of a study may be predetermined or may arise as the needs of the study unfold (De Munck, 2009). Predetermined design development is often linear, whereas situation-based design development is often dialogic and starts with a context. As an example of how methodological designs ideally unfold, consider a soccer game in which the coach has an intended plan before the game but very much responds to the game’s play-by-play needs.

Stages within Mixed Methods Strands

For the overall purpose of a mixed methods study, the relationship between strands may be of greater importance than the components within strands. However, clarifying components within strands can add clarity to the project as a whole. For that reason, I now discuss components within strands.

Design. In the social sciences, the reason for organizing the design of a study before its inception is to increase chances of obtaining warranted findings (Gorard, 2010). As with monomethod research, the design of each mixed methods strand is informed by the strand's purpose, by the intended approach to analysis, and by the approach to data collection. Each strand's design may span from less structured, open-ended, or qualitative (such as ethnographic, grounded theory, phenomenological, or narrative studies) to more structured, closed-ended, or quantitative (such as experiments or surveys) (Creswell, 2013a).

Sampling. As with designing strands, approaches to data analysis and collection should determine the approach to sampling each strand. Sample options for less structured strands may be small or selected theoretically, and do not statistically represent a population (Onwuegbuzie & Leech, 2007). Less structured sample approaches may allow nonstatistical inferential, analytic, or case-to-case generalization. Sample designs for more structured strands must be larger, must statistically represent a finite population, must involve randomized probability of selection, may involve stratified and/or clustered levels, and must allow statistical generalization to a finite population (Groves et al., 2009). Examples of increasingly structured sampling approaches include nested sampling

for maximum variation, criterion sampling based on previous instrument scores, and simple random sampling without replacement.

Data collection. Less structured or qualitative data collection seeks ambiguity, allows participants to formulate answers, allows longer answers, is conversational, and provides text-based raw data that directly represent participants' spoken or written word (Guest et al., 2012). More structured data collection seeks explicit clarity, involves researchers formulating answer categories, encourages short answers, often (but not necessarily) interacts with participants in standardized ways, and provides raw data that includes representational numeric or other symbols (Conrad & Schober, 2008). Examples of unstructured to increasingly structured approaches to data collection are open-ended interview questions (e.g., "How do you feel about this?"), event history calendars that appropriate conversational flexibility and time-oriented cues to collect relatively quantitative data (Belli, Smith, Andreski, & Agrawal, 2007), and closed-ended interview questions (e.g., "On a scale of 1 to 5, where 1 is 'very sad' and 5 is 'very happy,' how do you feel about ... ?").

Data management. Within and across each strand, managing data is important. Technically, managing data starts with recording data at the moment data are collected. Less structured strands may involve transcribing audio recordings and importing data to a tool such as MAXQDA ("MaxQDA," 2014) that assists with managing data and organizing codes but does not conduct the thoughtful process of coding data. More structured strands may involve capturing data not collected electronically or importing data to an analysis package such as STATA (2014). Managing data collected "in the manner of a conversation" may involve recording that data with more structure than a

participant has spoken, as in the case of event history calendars (Suchman & Jordan, 1990, p. 233). Managing any form of data may involve preparing databases for individual or team analysis.

Data analysis. Within each strand, data analysis may span from less structured, open-ended, or qualitative to more structured, closed-ended, or quantitative. Analysis of less structured strands may start with codes inductively arising from participant answers, and then may involve coding the codes (Miles, Huberman, & Saldaña, 2014). Analysis of more structured strands may deductively start with preconceived ideas, may determine codes before collecting data (or implement a pre-existing code frame or logic), may take a calculating approach, or may focus on counting themes (Mehl, Eld, & Diener, 2006). Examples of increasingly structured data analysis within a strand include grounded theory processes and correlation or regression.

Applied Research

Much of South African research, including mixed methods research, is applied (see Cooper, 2011 regarding the “mission of application-oriented research” (p. 6) among Western Cape universities). As opposed to basic research that seeks new knowledge, applied research seeks to mitigate pressing social problems and studies applications of basic theory (D. C. Miller & Salkind, 2002; Patton, 2002). Assuming that research questions indicate a need for both text-based and numbers-based data, mixing methods is often a practical necessity in applied research (Fielding, 2010). Applied research requires considering context and is dominated by practical concerns.

Evaluation

Evaluation assesses the results of interventions (D. C. Miller & Salkind, 2002). Utilization-focused evaluation concentrates on information necessary for a study's main intent, rather than focusing on whether goals are "clear, specific, and measurable" (Patton, 2008, p. 277). Evaluation may be problematic if community stakeholders view evaluations as judgments of whether a program has met its goals, particularly if an evaluating organization wants to determine the effect of a fixed implementation when community members want an ongoing rather than a fixed model (Mertens, 2010c; Patton, 2008). Concerns of research participants and community-level evaluation stakeholders may be addressed through collaborative research.

Collaborative Research

Research arrangements may be contractual, consultative, collaborative, or collegial (Cornwall & Jewkes, 1995). Because much research in southern Africa is collaborative, I discuss the potential relationship of mixed methods to collaborative approaches. A joint effort between participants and researchers in collaborative or participatory action research is often recommended for social research (e.g., Guba, 1990), but is not often explained (Shulha & Wilson, 2003). Fine and Torre (2006) described the purpose of participatory action research as intensifying demands of the margins and elaborating alternative possibilities for justice. As Cornwall and Jewkes (1995) asserted, researcher attitudes, rather than methods, comprise the most important aspect of participatory research. One question that frequently arises with collaborative research is what counts as evidence. In collaborative mixed methods, varying perceptions of

evidence may denote epistemology, but arguing over what constitutes a worthwhile study is not a good use of interaction time.

The purpose of collaborative research is to increase the validity of local knowledge (Schwartz, 1994). For this reason, collaborative research is more of a methodology or an orientation than a method (Fassinger, 2005). It explicitly coproduces knowledge, emphasizes local perspectives, views participants as colleagues, and involves research *with* rather than *on* participants (Willis & Saunders, 2007). The nomenclature of “collaborative research” is sometimes used interchangeably with participant-centered research, participatory research, cooperative inquiry, community-based research, community-based participatory research, action research, and community-based participatory action research (e.g., Groundwater-Smith & Irwin, 2011; Heron & Reason, 2001; Plowright, 2011; Schwartz, 1994). Participatory research often engages participants as researchers. Collaboration can engage participants both conceptually (e.g., Alegria et al., 2004) and in implementation (e.g., Bolton & Tang, 2002).

Facilitating collaboration requires social, cognitive, and methodological processes (Schwartz, 1994). It also requires familiarity with, and flexibility in, applying ethnographic approaches. Furthermore, facilitating collaboration requires the ability to jointly solve problems, identify and negotiate a range of diverging perspectives, and persistently generate cooperative ideas and models. Facilitators need the ability to generate new research methods and to encourage the emergence of local knowledge.

Collaborative mixed methods research. By engaging participants as researchers, collaborative mixed methods purposefully applies multiple perspectives to the research process. In such studies, choices of methods, forms of analyses, and how to

combine data are based on each project's complex needs rather than on predetermined methodological practices (Shulha & Wilson, 2003).

Several mixed methods studies have exemplified a collaborative or participatory approach. Among them, Axinn and Pearce (2006) used participatory rural appraisal to study neighborhood changes in Nepal. Ungar and Liebenberg (2011) studied resilience across minority and majority world cultures (inside and outside the global west, respectively), by involving participants at all phases to avoid exporting minority world concepts to the majority world. Hall and Howard (2008) collaborated across disciplinary researchers in a quality of life study. Betancourt et al. (2011) used community-based participatory methods to evaluate an intervention to strengthen families in Rwanda. By way of a final example, Schwantes (2011) used a participatory approach to a randomized control trial to study the effects of music therapy on depression and anxiety among migrant workers from Mexico.

Chapter Summary

In summary, this chapter has discussed the following frameworks: my personal transcultural experience, my subjective philosophical orientation, the theory of tacit cultural knowledge, and the methodological content of my study. The methodological framework provided sections on mixed methods research in general, conceptual aspects of mixed methods studies, experiential stages within mixed methods strands, applied research, evaluation, and collaborative research. In contrast with the mixed methods focus of my study's content, chapter 3 discusses the qualitative case approach of my study's design.

CHAPTER 3: METHODS

Designing the Study

The design of this study is an instrumental qualitative case. A case study is an in-depth inquiry into a single example, or into an issue that the case illustrates (Creswell, 2013a). Case study enables researchers to consider meaningful and holistic characteristics of life events (Yin, 2014). Researchers prefer case studies for addressing questions of *how* or *why* when they have minimal control over a study's context and when the phenomenon of interest involves real-life circumstances. The researcher must distinctly bind the situation with more variables of interest than cases, particularly when studying a case in depth or when carefully studying the contexts of a case (Stake, 2005; Yin, 2014). Although researchers must clearly define a case, the richness of case study lies in its ability to consider the messy interaction between a case and its context. A case study itself is a method rather than a methodology (VanWynsberghe & Khan, 2007). As such, it allows researchers to interweave other methods, and to situate the case in various epistemological contexts.

Case study is appropriate for examining mixed methods research because I am sincerely interested in discovering how the actors, South African mixed methods researchers, function or would like to function in South Africa as distinct from globally northern contexts (Stake, 1995). This single qualitative case serves an instrumental purpose with the case secondary to the primary role of understanding ways of expanding mixed methods to account for broader cultural realities (Stake, 2005). Instrumental case studies may contribute to making knowledge more explicit (MacQuarrie, 2010).

Case studies may further provide in-depth understanding of cultural phenomena and renew methodologies (e.g. O'Neill et al., 2002; Zhou & Creswell, 2012). Zhou and Creswell (2012) adopted a qualitative case to study the diffusion of mixed methods in East China. They focused on why and how researchers used mixed methods, what qualitative and quantitative approaches researchers used, and the current status of mixed methods in China. They then found that more experienced academics have helped less experienced academics to use and understand mixed methods. The authors recommended that future research in China consider the role of mixed methods across disciplines.

Flyvbjerg (2011) listed five misunderstandings of case study. The first misunderstanding is that context-dependent practical knowledge is less valuable than context-independent theoretical knowledge. The second misunderstanding is that a case study cannot contribute to scientific development because a single case is not generalizable. The third misunderstanding is that case study is more appropriate for developing than for testing a hypothesis, or for building theory. The fourth misunderstanding is that case studies tend to confirm a researcher's preexisting notions. The final misunderstanding is that theories and general propositions are difficult to develop from case studies. In response to these concerns, Flyvbjerg (2011) asserted that scientific thought overemphasizes formal generalization and underemphasizes the importance of examples. Knowledge is inherently context dependent, and case studies produce such knowledge in a way that provides a nuanced understanding of reality.

Cases may be studied via quantitative, qualitative, or mixed methods (Yin, 2014). Within a knowledge context, qualitative methods may look at tacit understanding of reasons for exchanging knowledge, and quantitative methods may look at explicit aspects

of phenomena to find patterns (Fazey et al., 2014). Because my case focuses on tacit knowledge, it is a qualitative study.

My case embeds units of data collection and analysis, including interviews among mixed methods researchers and a corpus of written texts (Yin, 2014). The approach of the case study enables research questions to focus on how researchers in South Africa implement mixed methods, on creating rival hypotheses of how mixed methods may address cultural plurality, on the phenomenological context, and on situations over which I as researcher have had little control (for example, the number of mixed methods studies that have been conducted in South Africa). A single extreme case uniquely demonstrates applications of mixed methods research in South Africa's unusual combination of sociocultural history and linguistic hybridity. Given the high plurality of most of the world, my goal is to naturalistically or logically (not statistically) generalize findings of this qualitative case design (Rapport & Dawson, 1998), as the title *an instrumental case* implies. I intend to naturalistically generalize from transcultural flows—cultural forms that are reused to mold new identity across contexts (Pennycook, 2007)—between the global north and southern Africa to transcultural flows between the global north and locations outside southern Africa.

Defining the Case

I have bound the case by the set of mixed methods studies and authors in South Africa. The reason I chose South Africa is because of the country's broad array of hybrid cultures and because I lived in South Africa during my formative years. Studying the case of research methodologies in South Africa may allow globally northern researchers to more fully understand the complexities of extreme cultural diversity and change for

which their approaches may not account. My case primarily refers to all researchers in South Africa who have published mixed methods studies or who have supervised mixed methods theses at a masters or doctoral level. The case secondarily includes all mixed studies conducted by first authors affiliated with South African institutions.

Cases involve elements that fit into a larger context (Luker, 2008). The first related elements that I expected to encounter were those of southern African mobility and related hybrid South African language realities (Heugh, 2014). In addition, I anticipated the case would involve elements of the ever-present sociocultural concern with HIV/AIDS, the impact of beliefs related to *witchcraft*, and the impact of differing self-conceptions on contexts of social research in South Africa (Landau, 2014; Niehaus, 2013). Many dimensions of South African culture are fragmented and complex (de Klerk, de Wet, & Letšosa, 2011), a reality that I expected would tax existing models of mixed methods. I also anticipated that formal processes of academic publication and distribution in the global north would impair expression of South African realities through reports of research findings (Haider, 2008).

Some lines of thought propose that South Africa has successfully moved through the post-apartheid era and that, relative to other parts of Africa, its infrastructure—systems such as communication, power, and transportation—makes it a desirable case study. However, a gap between the goals of the South African constitution and the identities of South African people has led to a longing for certainty of the past (Soudien, 2012). Most of South Africa's infrastructure predates the demise of apartheid with minimal or no plans for future infrastructure (Lawless, 2007). Thus, I chose South Africa

as a case, not because the problems of apartheid have been solved, but because complexity remains.

Delimiting Data Sources and Analysis

Qualitative research can be seen as “inherently multimethod” (Denzin & Lincoln, 2011a, p. 5). Multiple methods within a case help to study and cross-reference processes that cultural producers engage (Davis, 2008). Accordingly, I collected and analyzed data from multiple sources including open-ended interviews for spontaneous opinions and a set of written texts for planned opinions. Figure 3.1 shows these units with dashed lines and the ultimate unit of interpretation with a solid line. Although the interview data is primary and the set of texts secondary, I present the methodology for the written data set first because resulting sources served as a basis for selecting interview participants.

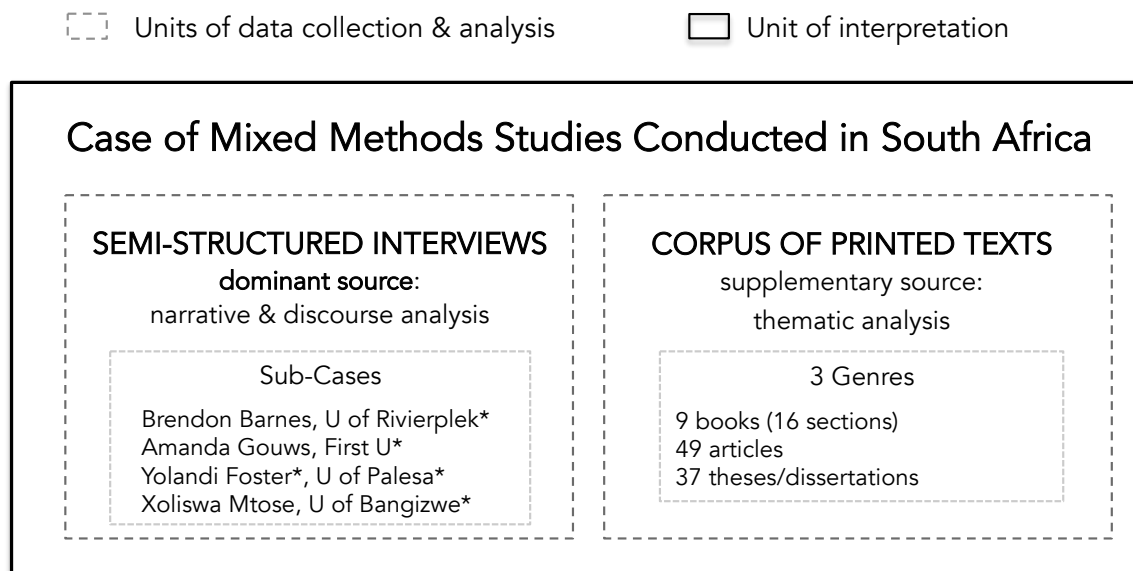


Figure 3.1. Units of Data Collection, Analysis, & Interpretation

The primary tool with which I managed the data for this study was MAXQDA ("MaxQDA," 2014), a software package that analysts commonly use for managing and coding qualitative data. However, many items in the written corpus of texts (books, book

sections and several dissertations) were available only via hard copy and could not be imported into an electronic management system. Therefore, in addition to MAXQDA to code interview transcripts and manage bibliographic data from EndNote, I used f5 (Dresing, n.d.) to transcribe interviews and Microsoft Word to narrate interviews, summarize texts, and compare information across sources. I also wrote notes by hand on hard-copy texts.

Defining Corpus of Written Texts

A *corpus of texts* exemplifies naturally occurring language, has form and purpose, and may be as short as a few sentences or as long as a set of written texts (Hunston, 2002). In contrast with a *data set* that includes the particular data a researcher analyzes, a *corpus* includes all data a researcher collects for a study (Braun & Clarke, 2006). Corpora are particularly useful for studying cultural knowledge (Pickering, 2008). In a broad sense, both the interview transcripts and the written documents in my study comprise a corpus. However, for the remainder of this dissertation, I refer to the written texts as *the corpus*.

Collecting written texts. To collect written texts, I conducted an initial search for possible texts from which I manually composed the corpus and subsequently composed a sub-corpus for reporting. For possible written texts, I searched from the following three sources:

1. results of an electronic search,
2. reference lists in other texts, and
3. South African university bookstores.

For the electronic search, I first specified the terms *mixed methods* (*gemengde metodes* in Afrikaans) and South Africa anywhere in the article through Dissertation Abstracts International, WorldCat, Academic Search Premier, Web of Science, Google Scholar, Google Books, and Google. Access to listings in databases such as African Electronic Journals, African Journals Online, Southern African Libraries, and the South African National Bibliography would have been invaluable but were not accessible through the University of Nebraska-Lincoln and would have required a paid subscription. Because Google Scholar returned all of and more than the South African listings in academic databases to which I had access, I relied on Google Scholar as my primary source for identifying corpus items.

Realizing that a sizeable number of items refer to combined methods, I additionally searched for terms including the word *combined* (*gekombineerde* in Afrikaans). Several English items also used multiple terms (e.g. combined approach and mixed approach). Consistent with the fact that public higher education programs in South Africa require English or Afrikaans for theses and dissertations, and that African languages have traditionally been oral rather than written, I encountered no term for mixed methods in languages other than English or Afrikaans. An evaluator friend suggested the word *-hlangene*, a word that means *between, together, a beautiful thing, intercourse*, or *intimate* in Nguni languages (Colenso, 1884; Du Plessis, 2010), but found no items with either *-hlangene* or the related *-hlangana*. Table 3.1 shows the final list of terms for which I searched Google Scholar.

Table 3.1. Final List of Electronic Search Terms

| Term in Addition to “South Africa” | Language | English Translation |
|--|-----------------------------------|--|
| <i>–hlangana / –hlangene</i> | Nguni family (isiZulu/Ndebele) | “mixed or combined” (loosely translated) |
| <i>combined approach</i> | English | |
| <i>combined method</i> | English | |
| <i>combined methods</i> | English | |
| <i>combined qualitative and quantitative</i> | English | |
| <i>combined quantitative and qualitative</i> | English | |
| <i>gekombineerde kwalitatiewe en kwantitatiewe</i> | Afrikaans | “combined qualitative and quantitative” |
| <i>gekombineerde kwantitatiewe en kwalitatiewe</i> | Afrikaans | “combined quantitative and qualitative” |
| <i>gekombineerde metodes</i> | Afrikaans | “combined methods” |
| <i>gemengde benadering</i> | Afrikaans | “mixed approach” |
| <i>gemengde metodes</i> | Afrikaans | “mixed methods” |
| <i>mixed approach</i> | English | |
| <i>mixed method</i> | English | |
| <i>mixed methods</i> | English | |

To manually compose the corpus of written texts (see Appendix A) from among all the texts identified through the electronic searches, I applied the following criteria:

1. first author affiliated with a South African institution at the time of publication;
2. mentioned *mixed*, *combined*, or *qualitative* and *quantitative* approaches outside the bibliography; and
3. published through 2013.

Because words are symbols that do not correspond with a single literal meaning—especially in parts of the world where English and other languages are used in ways less prescribed than in the west—identifying the types of data a study includes through specific terms alone may be misleading. For several reasons, I did not require that texts discuss the mixing process. The case of mixed methods in South African involves authors of highly plural linguistic backgrounds and hence of hybrid English customs (Kachru,

2006). I also suspected that South African authors would have had less formal training in mixed methods than globally northern researchers, and knew that South African authors tended to combine methodological and content-related issues within a single publication, allowing less space to talk about mixing. Another reason I intentionally drew a wider circle was to broadly situate the conversation of South African mixed methods.

Because written genres vary tremendously in the extent to which they exemplify political voice (Devitt & Reiff, 2014), the corpus included edited volumes, monographs, and book chapters; journal articles, mostly peer-reviewed; and masters or doctoral level theses (see Appendix A for a list of items in the corpus). Articles came variously from journals of primarily African readership, global readership, and globally northern or American readership. Among journals that claim to have a global readership, several were based on globally northern expectations of article styles and, to some extent, content.

Analyzing written texts. To analyze the corpus of written texts, I applied thematic analysis, in which themes summarized particular patterns of meaning. This analysis included a combined latent and theoretical approach that sought for both organizational and embedded features within and across the texts (Braun & Clarke, 2006). I took a theoretical approach to deriving thematic meaning by coding in relationship to the corpus design and well as from within the text-based data. As with the interviews, I focused both on details of salient individual texts and on the corpus data set of written texts as a whole. I looked for themes more latent than semantic and search for interactions of sociocultural contexts and authors' individual intents.

Ngulube (2015) and Grbich (2013) articulated that researchers may conduct thematic analysis with or without coding. Primarily without coding, I developed text-external theme clusters (e.g., year and genre) and text-internal theme clusters (e.g., methodological relative to applied focus; see Biber, 1993 concerning distinctions between text-external and text-internal aspects of text corpora). The master corpus in Appendix A shows an example of text-external information. To assist myself in processing text-internal information, I developed text-based thematic matrices as Kuckartz (2014) described, by placing items on the horizontal axes and content on the vertical axes (see Appendix R for example) related to an analytic protocol I had previously created (see Appendix B for protocol). The cells of the matrices contained short excerpts or rephrased text components. Although these matrices do not form the basis of chapter six, they allowed me to understand and refer to overviews of items in my corpus.

Collecting and Analyzing Interview Data

I turn now to the collection, management, and analysis of interviews with South African mixed methods researchers.

Collecting interview data. To collect face-to-face interview data, I identified possible participants after which I identified specific researchers to invite to an interview and contacted those I had invited. I then developed an interview protocol and conducted the interviews.

To select potential interview participants affiliated with South African institutions, I first identified authors of mixed methods publications (journal articles, books, or book sections) and advisors of masters or doctoral level theses from the corpus

of texts in the spring of 2013. I defined mixed methods authors or advisors based on publications that mentioned the terms listed in Table 3.1 (e.g. *combined methods*, *mixed methods*, or *qualitative* and *quantitative*) at the time of my search in the spring of 2013. Of the 15 resulting authors I had identified at that time, 13 affiliated with *historically white universities* (HWUs), one affiliated with a *historically black university* (HBU), and one affiliated with a university formed from a merger of historically white and black universities. All mixed methods authors affiliated with public universities.

Knowing that I would analyze interview data discursively, I considered that sampling for this purpose varies from as small as the narrative of an individual person, depending on the intended analytic depth (Starks & Trinidad, 2007). From the 15 authors in the potential sample pool, I purposefully invited a subset of seven mixed methods authors or advisors affiliated with historically white or historically black institutions, and with traditional or comprehensive as opposed to technological institutions.

I contacted the seven potential participants via the e-mail addresses provided on their articles, hoping to interview at least four (see Appendix C for the email invitation). Four invitees affirmed (see Appendix D for a list of participants and background information and Appendix E for a list of abbreviations used throughout the tables and text), one disconfirmed without time during the weeks I was available, and two did not respond. One of the four who responded positively did not respond initially, but the department at her previously affiliated institution provided an e-mail address at a new institution that led to an affirmative response.

Linguistically, the email invitation included all information in English and Afrikaans with a bit of isiZulu and stated that I speak a little bit of isiZulu (see Appendix

C). I offered participants the option of a language of their choice and of communicating via an interpreter if they preferred a language other than English or Afrikaans. All participants responded to the e-mail in English, for which there may be several reasons: South Africa's 11 official languages have resulted in unofficial use of English as a *lingua franca*; South Africa's National Research Foundation's (NRF) rating expects that professors publish in international journals addressing western academic audiences (Visser, 2007); and all degrees in all public institutions of South Africa are offered only in English or Afrikaans with English as the most common (Schoole, 2006). At the interview, I greeted each participant in the language of my conversational familiarity that I expected was closest to his or her native language. When requesting consent, I again asked participants their language preference (see Appendix F and Appendix G). Three of the four participants chose English. Of the three, one native Afrikaans speaker preferred not to speak Afrikaans for the interview, as she was accustomed to speaking English rather than Afrikaans for professional purposes. One participant had no preference between English or Afrikaans so, to minimize the possibility of misspeaking or misinterpreting, I chose English.

Before conducting the interview with the participants whom I had selected, I practiced with a well-traveled and bilingual English and Spanish speaking professor with whom I had co-taught and under whom I studied during the trip to South Africa. The practice was less than ideally productive because the professor was American rather than from a different part of the world. In reality, conducting a face-to-face interview with a non-U.S. researcher who had conducted mixed methods outside the United States would have been a difficult feat.

Among the four mixed methods researchers who agreed to participate, I conducted the interviews between July 26 and August 8, 2013. Each participant chose the interview location when they responded to the invitation. Two chose coffee shops and two chose their offices. Each participant agreed to have his or her interview audio-recorded, for which purpose I used a Sony ICD-SX733 digital voice recorder ("Sony ICD-SX733 digital flash voice recorder," 2013). The quality of the office recordings was much better than the quality of the coffee shop recordings. For the first coffee shop interview, the participant and I moved to three different locations within the selected shop before the acoustics were appropriate. For the second coffee shop interview, the audio recording is difficult to hear, especially during times when machines accompanied our conversation in the background. I brought snacks and fruit-based beverages to the interviews.

A semi-structured interview protocol served as a flexible basis for eliciting participants' thoughts (see Appendix H). In addition to icebreaking and closing questions, the protocol focused on perceptions of research approaches, mixed methods use and familiarity, and the interaction of culture and mixed methods research. I asked questions in a conversational style rather than a standardized manner and sequence. I also looked participants in the eye and followed their leads for the tone of the interview.

Unknown to me, each participant developed unsolicited thoughts based on the interview topic I had provided in the contact e-mail. I allowed participants to discuss these thoughts early in the interview (sometimes at length) before guiding the conversation toward the formal part of the interview. The unsolicited material very much related to the influence of tacit cultural knowledge (my theoretical lens) on research

methodology in South Africa, though not exclusively to mixed methods research.

Although I had originally planned to talk with participants for two hours, the natural flow ended after about one hour. Not wanting to exceed the interest span of participants, I brought the interview to a close when they began to tire.

In the first several interviews, I expressed more of my own exuberance than was necessary. As the interviews progressed, I minimized the extent to which I shared my perspectives when participants introduced topics about which I felt strongly. With each interview, I became more comfortable with pauses, allowing participants to provide further insights (Krueger & Casey, 2009), and guarded against jumping into topics prematurely. Also in the later interviews, I more actively considered participants' passions for sharing their thoughts, and focused the conversation at an earlier point. In the final interview, I allowed a valuable angle on the non-binary nature of northern and southern cultural influences on mixed methods that the first three participants had not provided, when a participant asserted that northern and South African influences are indistinguishable.

As is often the case in qualitative interactions, I had planned to ask key questions toward the end of the interview (Eliot, 2013). However, allowing participants to share their preconceived thoughts toward the beginning of each interview decreased the time available for my intended questions. As a result, I sometimes rushed over key details relating to mixed methods. In the grand scheme, I could have planned fewer questions and planned in advance to ask only the questions most relevant to each interview conversation.

Managing interview data. After each interview, I moved the audio recording onto the hard drive of my MacBook. To benefit from repeated exposure to the audio-recordings, I personally transcribed interview recordings using f5 software for Mac (Dresing & Pehl, 2010). Relative to general transcription rates of three to ten hours per recording hour (Bailey, 2008), I transcribed at a rate of about six hours per recording hour, indicating greater attention to detail. Appendix I shows the amalgamation of symbols for this purpose and Appendix J shows an example of a transcript page. I first transcribed in a literal style and then created a more edited copy that was easier to read (Gee, 2014b).

Because transcribing recordings is an interpretative process (Lapadat & Lindsay, 1999), and because my participants were research methodologists who seemed to enjoy the interview conversation, I thought my participants might appreciate having a record of our interview, and provided a transcript to each participant. I used MAXQDA to manage transcripts and their codes with integrity but without automating the coding process ("MaxQDA," 2014).

Analyzing interview data. Based on the richness of this study's interviews, I narratively wrote and rewrote each interview transcript as a method of inquiry analysis itself (Van Manen, 2014). Narratives can serve to interpret discourse (Daiute & Lightfoot, 2004), to enable readers to understand a case experientially, and to understand uniqueness within each participant's description as a sub-case (Stake, 1995). Using the narrative writing process, I developed themes across interviews within the case, after which I developed assertions by summarizing my interpretations and proposing naturalistic generalizations.

Following the narrative analysis, I discursively analyzed interview transcripts. Analysis of discourse studies spoken or written language as it is used, including its meaning or connotation (Gee, 2014b). Discourse analysis also describes linguistic experiences relative to cultural contexts in which language is used and enables analysts to identify linguistic assets by which people construct or reconstruct their lives (Weiyun He, 2001). Discourse analysis is more a methodology than a method, meaning that researcher epistemology is inextricably woven into the process (Fairclough, 2010; Kolankiewicz, 2012). The dynamic practice of discourse analysis inevitably links to theoretical concerns and involves continual revision (Macleod, 2002). Critical discourse analysis seeks to interact with politics, where politics involves social goods such as writing or speaking in ways that implicitly define what is acceptable, normal, or appropriate (Gee, 2014b). Accepting that language is inherently political, all discourse analysis is critical. Lest we forget the weighted meaning of our work, Gee (2015) reminds us that “theory and meaning are moral matters” (p. 20). Discourse analysis, then, interprets and explains relationships between texts and their contextualizing sociocultural practices (Machin & Mayr, 2012). Discourse analysis can also help to make tacit knowledge explicit (Much, 1992).

I analyzed the discourse of interview texts through Gee’s (2014a) approach to discourse analysis, which identifies aspects of the social world we humans build from the linguistic tools with which we build them. The purpose of analyzing larger levels of discourse is to acknowledge and perhaps address social, institutional, or political issues. The most relevant tools distinguish larger societal discourses (big *D* discourses) in contrast to more literal discourses (small *d* discourses) of research (Gee, 2014b). I was

particularly interested in big *D* discourses of research in general and mixed methods in particular as my participants describe them. In other words, the purpose of discursively analyzing my interview texts was to explore broader societal discourses represented by my participants, rather than to analyze my participants' voices for their own sakes. Through these tools, I used the small *d* interview discourse as a window to big *D* methodological discourse.

The process of implementing this discourse analysis began by transcribing the interview conversations. I then moved back and forth between tools and interview texts. I originally coded in MAXQDA ("MaxQDA," 2014) looking for top-of-mind references to the discourse tools I expected would surface, and for any comments that stood out as important to me. However, I eventually used a Microsoft Word table with one row per tool and one column per participant. I copied and pasted excerpts of interviews and narratives in appropriate cells. From there I reduced, distilled, and narratively rewrote excerpts,³ looking for discourse themes that any of my participants stated in a particularly strong way. I also looked for common discourse themes across participants. During this process, I omitted a few original tools, added a couple more from Gee's (2014a) toolkit, and created one of my own. As I became comfortable with the contents of each table cell, I realized that the tool categories seem to build somewhat sequentially and reordered the tools accordingly.

I ultimately relied on the following tools. Finally, I concluded that the tools fell roughly into two clusters: identity, language, and relationships; and politics, economies (a tool I added), and knowledge. The first indicates how we as speakers use broad big *D*

³ See Giorgi (2009) concerning analytic reduction.

discourses to build aspects of our social identities (Gee, 2014a) and the remainder theoretically study how language relates to the world and to culture:

- the “identities building tool” (p. 112) that asks what identities a speaker attempts to enact;
- the “social languages tool” (p. 162) that asks how words and their structures convey a particular social language;
- the “relationships building tool” (p. 120) that asks how words influence relationship between various people;
- the “politics building tool” (p. 124) that asks how words help to determine what is considered a social good, and how social goods are distributed; and
- the “knowledge building tool” (p. 141) that asks how the text privileges ways of knowing.

Other tools of discourse analysis would have been helpful but, given the focus of this dissertation on narrative and case-related thematic analysis, have restricted myself to these tools.

Validation Strategies

Strategies for asserting validity in qualitative studies may include transactional and transformational approaches (Cho & Trent, 2006). When following *transactional approaches*, researchers assume that a fixed truth exists, and that they can assure the rigor of their studies by applying certain techniques after conducting a study. In contrast, when following *transformational approaches*, researchers believe that social experiences construct human perceptions of reality and that researchers cannot assure the rigor of data. Transformational approaches to validity then deal with the crisis of representing

implicit cultural values and relate to the ultimate decisions and actions a study's findings spawns, similar to the consequential nature of construct validity (Cho & Trent, 2006). Recognizing that my dissertation must provide transactional evidence, I primarily discuss my efforts in this regard, after which I briefly promote transformational approaches that I will expand in discussions of validity beyond the scope of this dissertation. Because I believe that transformational approaches are more legitimate than transactional approaches and recommend seeking quality during a study over focusing on trustworthiness after a study has been conducted, I follow this discussion of my transactional efforts with a discussion of my efforts toward transformational validity.

Transactional Validation

To reflexively engage a critical view of myself as a researcher, I pursued journaling, peer debriefing, member checking, although I did not go as far as pursuing triangulation. I reflexively validated my claims using field notes and various kinds of memos, mostly by journaling my experiences. On twenty occasions, I wrote reflections (field notes) to make my tacit thoughts explicit (Emerson, Fretz, & Shaw, 1995). I journaled when I searched for literature, within 24 hours of each interview, while transcribing audio-recordings, while analyzing interviews, on the historical role of statistics in South Africa relative to my lived experience, on whiteness in South African academia, on the inseparability of methods and content in South Africa, on participants' publications concerning the phenomenon of race, and on my need to focus on heterogeneity in South African research contexts.

Peer debriefing involves iteratively reflecting across research phases with a disinterested peer who encourages reflection on a researcher's sociocultural position (K.

M. T. Collins, Onwuegbuzie, Johnson, & Frels, 2013). For this purpose, I met with Michelle Howell Smith, PhD, graduate of the University of Nebraska-Lincoln's Quantitative, Qualitative, and Psychometric Methods program. Michelle interviewed me on two occasions concerning my interview data collection and analysis, following each of which I wrote reflective notes. During the debriefing of data collection, I noted that cultural knowledge indeed impacts the research we do. Secondly, I noted that researchers need a broad skill set to conduct mixed methods research. In a part of the world that follows a British apprenticeship model, such skills are difficult to come by, as indicated by the results of my interview participants and of informal conversations while teaching a class at the University of Pretoria. During the debriefing of data analysis, Michelle and I discussed the relative importance I should or should not give to South Africa's rich qualitative heritage. I decided to emphasize those important qualitative contributions within the data I had collected for my bounded case, but not to venture beyond the bounded data to illustrate those contributions. Michelle also read the narratives of my interview findings after I had compiled them into chapter 5. She was the most appropriate person to do so based on my conversations with her at multiple times before, during, and after data collection and analysis. Her voice enabled me to further connect with western-based audiences, given her U.S. upbringing.

Member checking involves sharing data and interpretations with participants (Lincoln & Guba, 1985). By reflexively engaging with participants, I checked with member participants regarding their intents and allowed them to provide additional information. Speculating that the transcripts might serve as tokens of appreciation for participation, given that my participants are researchers, I distributed each participant's

individual transcript, narrative, and accompanying questions. Distributing the narrative analyses provided each participant with an opportunity to indicate anything they wanted me to change. I asked accompanying interview-specific questions in hopes that participants would clarify a few interpretations about which I was unsure. Each participant acknowledged the transcripts in a friendly way (e.g. “It looks good. Thanks for letting me have a look at the transcripts. Good luck with the rest of your work. Chat soon.”). One participant acknowledged the narrative and asked me to remind her a few weeks later because the beginning of the academic year was at hand. I reminded her a few weeks later but heard nothing further. A second participant indicated minor changes she wanted me to make and which I have made. I followed up with Brendon Barnes more recently to clarify his discussion of methodology in South African psychological research. He responded to that question by saying that “there are other ways of ‘doing’ psychology” than those of “the north.”

Presenting ideas at conferences assisted in furthering conceptualizing tacit cultural knowledge in mixed methods research (see Jabareen, 2009). I presented my work on four occasions: at the June 2014 Mixed Methods International Research Association conference in Boston, MA, at the November 2014 University of Nebraska-Lincoln’s College of Education and Human Sciences student research conference, in a February 2015 qualitative research class at the University of Nebraska-Lincoln, and at the May 2015 International Conference on Qualitative Inquiry in Urbana-Champaign IL. At the latter conference, several hours of conversation with a South African isiXhosa woman and member of the audience confirmed the major points of my presentation.

Triangulating data sources and incorporating multiple types of analysis may increase representation (suitable meaning) and legitimation (trustworthiness) (Leech & Onwuegbuzie, 2007). Researchers often describe the purpose of triangulating multiple forms of data as confirming or disconfirming one data set with another (e.g. Miles & Huberman, 1994). As I expected before corroborating my data, differences between interviews and the corpus of texts followed different worldviews and hence offered a more complete picture rather than serving as disconfirming evidence. This study's multiple sources of data have enriched each other by representing different aspects of South African methodological reality than a single source of data alone would have done. Based on the highly verbal nature of African life, the interviews elicited distinctly richer thoughts than the written texts reflected. Interview participants stated that expectations of northern publications and incentives for South African academics to publish in northern sources impact the writing of the global south, an assertion that formal voices of the corpus of texts, and of books in particular, implicitly reflected. Thoughts from my field notes and memos were consistent with my thoughts from the triangulation process.

Transformational Validation

In search of transformational validity beyond the scope of this dissertation, I attempt to crystallize diverse facets of the world of South African mixed methods relative to my encounter of it (Cho & Trent, 2006). Crystallization combines an infinite array of multidimensional angles and shapes, both theoretically and from participant perspectives (Tracy, 2010), for a more nuanced than a recipe-like approach to validity (Ellingson, 2009). By expressing doubts, crystallizing may allow us as researchers to know and understand more fully what we do not know (Richardson, 2000). Because the metaphor

of crystallization is consistent with the metaphor of a kaleidoscopic mosaic by which I described South Africa's continual transmutation in chapter four, crystallization will be relevant to reflecting on the use of mixed methods in that context. Table 3.2 presents Ellingson's (2009) principles of crystallization.

Table 3.2. Applying Ellingson's (2009) Principals of Crystallization

| Ellingson's (2009) Principal | My Application |
|--|---|
| Detailed descriptions with complex interpretations & consideration of cultural assumptions | Thick narrative descriptions of interviews Considered cultural assumptions from design through interpretation of study |
| Multiple forms of knowledge production across an analytic continuum with multiple genres of representation | Analyzed data through 2 forms of creative analytic writing (narrative and 2 discursive sets) and 1 postpositivist form of writing (thematic); narrative form was actively 1 st person |
| Reflexivity | Per Bryman and Cassell (2006) for 1 researcher interviewing another: <ul style="list-style-type: none"> • <i>Researcher</i> reflectivity: before & since conducting interviews; could have been greater or more focused during interviews <ul style="list-style-type: none"> ○ Identified my persuasions by writing about my doubts & strengths. ○ Interviewing in a land of my upbringing allowed me to ponder more angles than most western researchers would have been able to do • <i>Participant</i> reflectivity: Depth/richness of responses; comment examples: <ul style="list-style-type: none"> ○ That I knew instrument well enough to go forward & backward & generate story-like data ○ That I had "gotten [them] to thinking about" their MM work |
| Avoids presenting a singular truth | <ul style="list-style-type: none"> • Considered SA social/methodological realities across events & times • Multiple contextual levels: Africa, global south, & global north. • Discussion chapter: express doubt by highlighting vulnerabilities & positionalities along with meanings I have claimed |

Researcher Resources and Skills

On a personal level, readers in the United States, South Africa, and elsewhere may wonder about the integrity of studying South African cultural contexts given my whiteness and American-sounding accent. I accept the concerns of onlookers, but am a hidden immigrant to the U.S. (Bell, 1997) and remember my deeply-rooted African self.

Through this study, I faced the challenge of connecting childhood memories of apartheid South Africa with my adult experience of current South African realities.

My experience provides remarkable familiarity with and access to South African contexts relative to researchers of western background. Interview participants seemed comfortable with my African and methodological insights. I conducted each interview in a hybrid form of South African English, inserting Afrikaans or isiZulu small talk around the immediate discourse, and when uttering encouragement during the conversation. This engendered trust and enthusiasm with my participants whose verbal and non-verbal feedback indicated delight with my linguistic hybridity and spontaneous weaving between languages.

Methodologically, I have over 20 years of experience with quantitative, qualitative, and mixed designs. I completed a Master of Science degree in survey methodology with a minor in cultural anthropology. For my PhD program, I have focused on the influence of cultural constructs in mixing qualitative and quantitative inquiry. Keeping in mind that developing a picture of qualitative settings and their contexts “is a highly creative act” that requires intuition and encyclopedic familiarity with theories of social science (Morse, 1995, p. 148), I read voraciously about social theories. Furthermore, I accepted the challenge of studying the complicated realities of South Africa’s research methods discourse, and reflected on ways in which considering these realities may expand inquiry methodologies in the global north.

Ethical Issues

Research ethics in transnational spaces is becoming increasingly noisy (Stake & Rizvi, 2009). Within a particular space, high mobility transforms cultural meaning. The

fact that transnational spaces have arisen in South Africa while rural communities remain isolated demonstrates that cultures are no longer coherent entities. Difficulty defining a single culture for these blurred social spaces leads to deep ethical issues, given that past assumptions are less relevant.

What is considered proper and good in research depends more on the ways in which researchers agree with others in their culture than on how researchers consider people of cultures other than their own (Stake & Rizvi, 2009). Ethical problems are more pervasive than legal problems, and respond less well to authoritative approaches. Typical research values such as honesty, respect, keeping promises, and involving risk may mean different things or invoke differing levels of ethical significance across cultures.

Negligent research becomes more difficult to recognize outside a researcher's own singular culture.

Corresponding with a transformational sense of validity, broader or meta-ethical issues deal with the meanings and process of justifying statements about ethics (Kitchener & Kitchener, 2009). Because the breadth of all possible ethical theories is not simultaneously compatible, we as researchers must choose the principles that guide our reflection. For my study, I consider particulars on a case-by-case basis and allow ethics to be determined within cultural contexts (Stake & Rizvi, 2009).

In addition to aspects of research typically considered "problematic," research must consider differing political and ideological beliefs. Ethical challenges are unpredictable. Therefore, although I follow the Institutional Review Board requirements of the University of Nebraska-Lincoln, those requirements do not free a study of ethical concerns and I cannot pronounce that my research is free of ethical concerns. Researchers

in transcultural situations (including myself) are more likely to encounter ethical difficulties, and less likely to recognize those difficulties. Reflexive thought about assumptions of knowledge is one way to minimize these concerns (Stake & Rizvi, 2009).

Research in transcultural situations is more likely than research in monocultural settings to encounter ethical difficulties, and less likely to recognize those difficulties. In transnational spaces, “balancing competing principles” is more important than following a particular principle (Stake & Rizvi, 2009, p. 534). Toward this end, I present multiple and contradictory results.

In October 2012, I participated in the invitational Ethics Rupture Summit at the University of New Brunswick in Canada. The summit resulted in the New Brunswick Declaration ("The New Brunswick Declaration," 2013). As a signatory of that declaration, I support the opportunity to seek benefit more than risk. Hence, I proceeded with the proposed study after obtaining Institutional Review Board approval.

Corresponding with transactional validity, applied ethical issues relate to how people should behave and which aspects of behavior are valued (Mertens & Ginsberg, 2009). Two such issues arose relative to interview data I collected, and are mostly resolved. The first issue relates to multiple meanings of what it means to “know about” mixed methods. An interviewee was hesitant to participate because she did not consider herself primarily a methodologist and was unsure she had enough knowledge to offer. Sensing hesitation in an e-mail message from her assistant, I sent the interview protocol in advance. After arriving at the interview, I learned that the protocol had increased the participant’s fear and discomfort. When I asked her to contribute herself, no more and no

less, she became comfortable. I also garnered trust by looking in her eyes, and listening to her without talking too assertively (Eliot, 2013).

The second issue relates to the cultural weight of U.S. institutional review processes assigning risk versus the potential benefit to a study that researchers outside the United States may value. The University of Nebraska-Lincoln (UNL) initial institutional review board (IRB) allowed participants to choose whether I would use their own name or a pseudonym, and required pseudonyms for institutions with which participants affiliated due to the lack of a formal relationship between the University of Nebraska-Lincoln and the institutions with which my participants affiliated. UNL's IRB required that I assign the pseudonyms for participant's names (among those who chose not to have me use their own name) and for institutional names. After assigning pseudonyms, I e-mailed participants with the proposed names. One participant expressed concern that I had chosen a name relating to the older history of the institution but inconsistent with the post-apartheid era. I then asked the participant to choose a pseudonym. The participant responded saying that she saw no need for a pseudonym but suggested a different one explaining that my institution's IRB required a pseudonym.

In attempt to reciprocate participants' time, I offered the equivalent of a \$100 gift voucher in South African Rands (approximately R1 000 at the time) to a South African bookstore of each participant's choosing. Two participants accepted the offer and two declined. Participants seemed surprised at the offer and amount of the gift voucher, even though I had informed them of the vouchers in the invitation e-mail. My decision to offer \$100 was based on what I thought would be about \$50 an hour for a two-hour interview. In reality, the interviews averaged a little more than an hour.

Chapter Summary

In summary, this chapter has discussed the methods by which I have conducted the instrumental case study of mixed methods researchers and studies affiliated with South African institutions. Sources of data included four one-on-one semi-structured interviews and a corpus of written texts. I have analyzed the interviews by writing individual narratives to develop associated themes, and through discourse analysis across the interviews. Following this, I analyzed the corpus of texts through thematic analysis. I then discussed transactional and transformational aspects of validation followed by my resources and skills, discursive issues, and ethical issues. After presenting African contexts of South African mixed methods research in chapter four, chapter five will present findings from the interviews, and chapter six will present findings from the corpus of written texts.

CHAPTER 4: CONTEXTS OF SOUTH AFRICAN MIXED METHODS

Introduction

To naturalistically generalize beyond the instrumental case itself, I discuss realities co-occurring with the concept of interest (Stake, 1995), in this case sociocultural contexts surrounding general and mixed methods research in South Africa. Discussing contexts assists in making explicit the tacit nature of cultural knowledge (MacQuarrie, 2010). Regarding the methodological content of my case, researchers must attend to differences between contextual cultures and cultures from which research processes derive (Moghaddam et al., 2003). Beyond the need to explicate contexts of an instrumental case study, the validity of the way in which I represent the construct of South African mixed methods research requires explicating the times and places that inextricably shape this methodological discourse (Cherryholmes, 1988). Hence, in the remainder of the chapter I strive to give insight into African and South African life so that readers of this dissertation may further understand mixed methods research processes and participants in South Africa. I start the chapter with broader contexts of the global north and south, and then move to African contexts (see Figure 4.1). Although contextualizing the global south within the global north is not geographically literal, it does represent flow of power (Stenning, 2014). Within the contexts of Africa and southern Africa, I discuss domains of migration and mobility, apartheid and its aftermath, sociocultural identities, language, education, and the history of research.

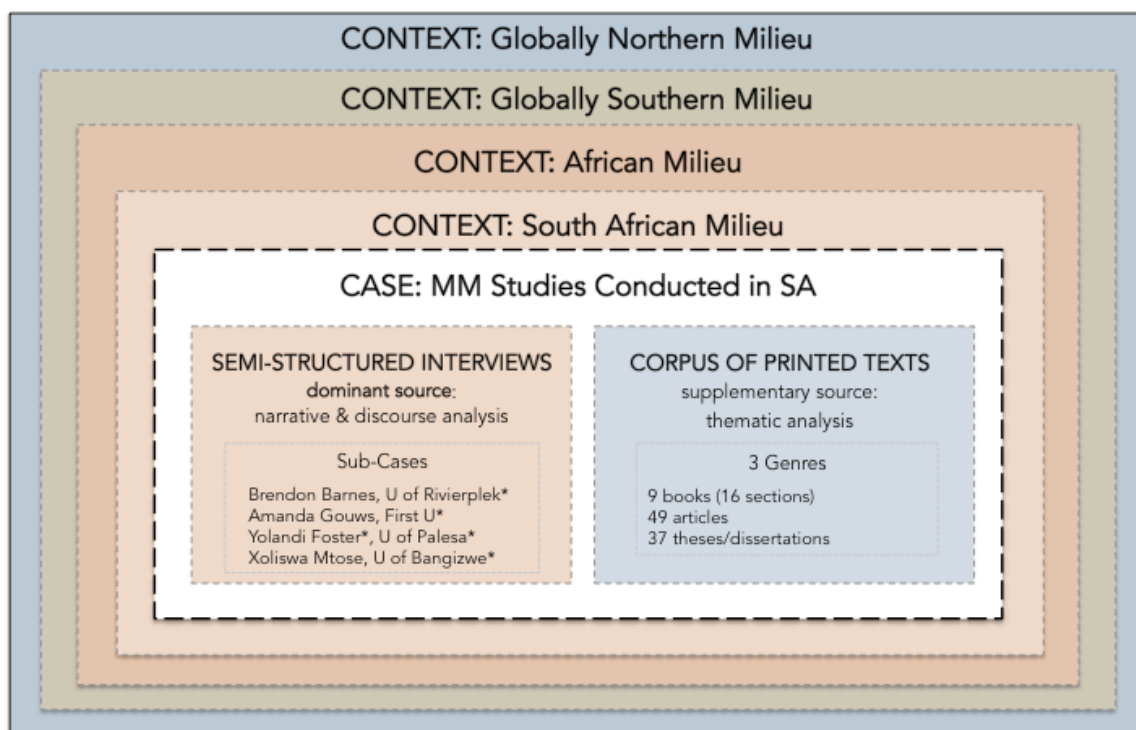


Figure 4.1. Contexts of the Case of Mixed Methods Research in South Africa

Globally Northern and Southern Contexts

The terms *global north* and *south* (see Appendix K for a glossary of terms related to African contexts of the case) are not fixed categories. The global north is a heuristic metaphor for people of western (European) descent that may at times include parts of the Asian world (Comaroff & Comaroff, 2012). Conversely, the *global south* is a metaphor for people of non-western (non-European) descent. The global south neither depends entirely upon, nor is entirely vulnerable to, ideas of the global north. However, decaying economies, ethnic conflict, and corruption suggest that the global north may be evolving toward the global south, impeding the dualism on which global polarity rests (Comaroff & Comaroff, 2012). The economic association of Brazil, Russia, India, China, and South Africa may affirm this.

The term and phenomenon of *research* derives from the global north (Tuhiwai Smith, 2012). Accordingly, globally northern investigators conducting research in the global south may exemplify colonial construction of knowledge by translating content-rich meaning into context-general information (Adams, 2014). Colonial knowledge then reinterprets results and translates information according to dominant scientific imagination rather than according to the experience of the people providing the information. Power structures of the global north thus contextualize the global south, requiring the south to follow the ways of the global north. Academic publications exemplify this power flow (Appadurai, 1996). Relative to the terms *west* and *east*, the terms *north* and *south* more fully include globally southern realities and imply a more current image of (post-)colonialism; articulating the *global south* then more fully enables African realities to surface.

African and South African Contexts

An awareness of African migration and mobility is important to understanding the hybrid cultural complex in which South African mixed methods are situated, and to subsequently relating the findings of this study to the effect of mobility and diversity in the global north. In addition to these concepts, I discuss other issues that allow readers to briefly understand South Africa's historical and present contexts as influence the development and needs of mixed methods research in that part of the world. These issues include South African apartheid and post-apartheid, kaleidoscopic aspects of South Africa, sociocultural and racial identities, rurality and urbanicity, social use of language, education, and the history of research in Africa in this section. Figure 4.2 provides a map of post-apartheid South Africa (www.mapsofopen.com).



Figure 4.2. Map of Post-Apartheid South Africa

Migration and Mobility

Understanding mobility in African contexts importantly situates mixed methods research in ever-changing milieus beyond what a cross-sectional snapshot of a single moment in time can describe. Before, during, and since days of formal colonialism, migration and mobility has characterized and does characterize the history of sub-Saharan Africa (Adepoju, 1995). This mobility has been and is both inter- and intra-continental. Prior to colonial days, groups of people from central and northern Africa circulated and migrated toward southern east Africa into what is now Swaziland and South Africa. During the inter-continental mobility of earlier colonial days, people of

European descent moved to and tried to economically develop the African continent (Rodney & Harding, 1981), resulting in forced and profound displacement across the sub-continent (Fernandez, 2013). In 1886, the discovery of gold in South Africa accentuated this development (Stewart, 2013). Throughout the twentieth century, administrators of gold, diamond, uranium, and platinum mines hired men from the southern African sub-continent to leave their families and board in hostels for months or years at a time, exploiting and disrupting the lives of families and extended families (Moodie, 1994). More specifically, housing thousands of men in dormitories with no encounters with women for months on end changed the sexuality of half a million men from countries such as Angola, Tanzania, Mozambique, and Malawi (Amin, 1995). This systematic reorganization affected the entire population of southern Africa.

Apartheid and Post-Apartheid

Understanding the phenomena of apartheid and post-apartheid is important in considering the history of who has inherited opportunities to formally study and publish on mixed methods research in South Africa, and will increase readers' respect for literacies and worldviews of South African research participants. Starting in the early twentieth century, South African policies of apartheid imposed spatial segregation that became increasingly formalized and that increasingly categorized races (Minter, 1988). This Hitlerian rationale and systematic oppression laid the groundwork for a "fiction of 'race'" (Amin, 1995; Franchi, 2003, p. 129). People categorized by the apartheid government as *black*, *coloured*, or *Indian* were required to live in derogatorily-termed rural *Bantustans* (*bantu* literally refers to people in many African languages and connotatively refers to *black African* people) or *townships* in urban areas (Bezuidenhout

& Fakier, 2006) (prior to the end of apartheid, *townships* on city peripheries were underdeveloped and often lacked water, sanitation, or electricity). Many people who lived in townships worked in *white* areas (e.g. cleaning, cooking, rearing children, or tending gardens), had an identifying passbook signed by the person for whom they worked, and had to “micro-migrate” 15-20 km daily without strong infrastructure for transportation (Jephta, 2015, p. 164).

Because several South African mixed methods studies have been conducted in a field related to psychology, I discuss the central role of the epistemology and culture of psychology as an instrument of apartheid (Vermeulen, 2011). Nazi-inspired apartheid psychologists directly contributed to and helped to develop South Africa’s system of forced segregation. In fact, the father of apartheid, Hendrik Verwoerd, was a psychologist. The heads of the Robben Island prison—where Nelson Mandela was held for many years—were counseling and clinical psychologists who “played a significant role in the oppressive machinery” (Saths Cooper in Barnes, 2014). I will say more about apartheid segregation in relationship to scientific measurement and psychology in the history of African research later in this chapter.

Since apartheid, South Africa is characterized by *intra*-continental mobility (Shea, 2008). Migrants from other parts of Africa have begun to see South Africa as an ideal destination. Living and moving across African cities gives rise to a thickly remixed phenomenon (Nchinda, 2002). Migrants whose location fluctuates for economic purposes may or may not identify as cosmopolitan, privileged or glamorous, and their decisions to migrate may not be voluntary. South Africa’s past and current transient nature requires viewing its sociocultural realities from many different angles.

South African Kaleidoscope

Given South Africa's highly mobile past and present, several authors have described the country's sociocultural reality as a mosaic (e.g., Mangaliso, 1994). Building on the metaphor of a mosaic, I suggest that South Africa is a three-dimensional kaleidoscope or a diamond that can be viewed from many different angles, angles that those of us looking on should not overly essentialize (Ouzman, 2005). This kaleidoscope is far more than apartheid-imposed categories of *black* (often called *African* in reference to descent), *white*, *coloured*⁴ (mixed race), and *Indian*. South Africa is a “knotty nexus of personal, group, national, and regional identity” (p. 198). Due to colonialism, apartheid, migration, global economic requirements, and media influence, South Africa is continually and kaleidoscopically changing (E. Louw, 2001). The case of South African mixed methods is embedded in this kaleidoscope of the sub-continent's complexly diverse and blended components, within which sociocultural identities evolve (Maqoma, 2011). Appreciating the kaleidoscopic nature of South African realities is crucial to understanding the multi-faceted aspects of life for which South African research needs to account.

Sociocultural and Racial Identities

To understand the validity of constructs addressed by South African research, readers need to understand the world to which research participants belong or with which they identify. Problematically, the apartheid years segregated and hence defined *racial* and *ethnic* groups (Guyot & Seethal, 2007). However, assigning place-based identities (as happens in many closed-ended research studies) may marginalize, threaten or exclude

⁴ In this dissertation, I honor British-based spellings.

people who identify differently than those around them perceive them as. In a highly mobile world, belonging relates more to change than to place (Durrheim, Rautenbach, Nicholson, & Dixon, 2013). The meaning people assign to moving across borders may be influenced by many domains of South Africa's multifaceted kaleidoscope, including what outsiders less familiar with change might term color, race, ethnicity, citizenship, class, gender, and sexuality (Shea, 2008). I pose that the complex intersections of these identities is far more tangled than looking at individual domains might imply.

Social Use of Language

Language relates to sociocultural identity (Norton, 1997). Insight into the complexity of South African language ownership is important to understanding South African mixed methods because the practice of mixed methods research is inherently discursive. Language ownership in South African contexts is not always synonymous with race (T. Moyo, 2002). Given South Africa's extreme multilingual complexity, people are born without a single linguistic inheritance; rather than a mother tongue, they acquire "an extensive and intricate repertoire of languages" and dialects (Parmegiani, 2008, p. 110).

Kembo-Sure and Webb (2000) provide a vignette that illustrates how a person in South Africa may encounter languages. Consider an imaginary Sipho, a "fourteen-year-old son of Zulu father and a Venda mother" (p. 63). The family lives in Mamelodi where most people speak siPedi, the language Sipho uses to talk with close friends. At school, the language is English. Because Sipho lives in the greater Pretoria area, he hears and needs to speak Afrikaans. At home, Sipho's parents expect him to speak English, but his only exposure to English is in the classroom. At local establishments, such as the post

office, Sipho speaks siPedi or seTswana. Local Indian shop-owners speak Fanagalo, a South African pidgin language (a language that arises from interaction between multiple groups of speakers who lack a common language, as Adendorff (2002) describes). Sipho's mother is comfortable and relaxes in tshiVenda, which Sipho speaks when he is with her alone. Church sermons are in siPedi, but the preacher is Ndebele. For fun on Friday nights, Sipho and his friends use Tsotsitaal, a newer urban dialect that signifies not being a nerd (Kembo-Sure & Webb, 2000). My question for you to ponder is this: when Sipho participates in a mixed methods study, in what language(s) should researchers invite him to participate?

The number of languages spoken in South Africa depends on how languages and dialects are delineated (Blommaert, 2007a). *Ethnologue* reports 31 languages including the following 11 official languages: Afrikaans, English, Ndebele, sePedi (Northern Sotho), seSotho (Southern Sotho), siSwati, xiTsonga, seTswana, tshiVenda, isiXhosa, and isiZulu (Lewis, Simons, & Fennig, 2015). Mesthrie (2002) describes the history of South Africa's language families as Khoesan (a combination of Khoe and San), Niger-Congo (including Nguni and Sotho clusters, among others), Indo-European (including languages of English, Dutch, and Indian descent), and Sign Language. I start the following subsections with historically more common languages of "African" (Niger-Congo) descent, continue with currently more common languages of European descent, move to realities of South Africa's translingual stew, and conclude this section by discussing policies of language in education.

Languages of Niger-Congo descent. South Africa's *Bantu* languages of have historically fallen largely into seSotho and Nguni clusters, with a few languages that fall

outside of those two clusters (Herbert & Bailey, 2002). Many *Bantu* languages were not written or were written only minimally until the mid-twentieth century, due to socio-political interests of missionaries and other groups. isiZulu and its versions are spoken more commonly than other *Bantu* languages in South Africa, and isiZulu was among the first to be formally written. Across time, distinctions between *Bantu* languages have gradually decreased.

Languages of European descent. Afrikaans and English are the colonially inherited and most frequently spoken languages in South Africa. Afrikaans was the language of apartheid and remains the language of many people who have not directly descended from a historically perceived Afrikaans ethnicity (Blaser & van der Westhuizen, 2012). For example, many *coloured* people (mixed *white* and *black* background) have, for generations, spoken Afrikaans in spite of lacking the privileges of *white* people during apartheid. Afrikaans has derived primarily from Dutch, with additional influence from low German, French, and *Bantu* languages (Roberge, 2002).

English is adapted around the world in a way that does not conform to local needs, hence the term *Englishes* (Spencer, 2013). English may be considered a family of languages, as are Romance languages (Kamwangamalu, 2003). On par with Indian or Nigerian English, South African English falls into an outer rather than the American and British inner circle of Englishes (Jenkins, 2009). Whether for exploitative, economic, or pragmatic reasons, English in South Africa is “spreading like wildfire” and has even become a home language in urban black areas (Kamwangamalu, 2003, p. 68). Critically speaking, the ways in which English functions in South Africa can be thought as one of three metaphors: a “poacher” (exterminating other languages), a “gatekeeper” (excluding

people from education or employment), and a “colonizer of the mind” (resulting in internalizing western values) (Parmegiani, 2012, p. 74).

Translingualism, and linguistic stew. “They rough you up, they send you anywhere. So, you got no control elokshon. It was even worse ke mina ekhaya, because enext door yasekhaya kwa kuyispoti itavern. It was one of the hottest taverns zaseMlazi,” said Ricky, a university graduate and interviewee (Ratele, 2001). Beyond the previous example, and beyond individual languages of African or European descent, the reality of South Africa’s language contexts today amount to a *stew*, as a friend (Eliam Nxumalo by alias) describes. When Eliam preaches to his Tswana congregation, he says he delivers half his words in English and spontaneously inserts the other half from other South African languages (cited by Diana Reinert, personal communication, January 4, 2015). By birth, Eliam speaks Shangaan and his wife speaks Sotho, though she studied at a Zulu college. According to his adult son, Eliam is well versed in Shangaan, Sotho, English, Afrikaans, and Tswana. He can also communicate in Pedi and Xhosa.

Eliam Nxumalo’s characterization of a linguistic stew represents the practice that I have observed of throwing words from several languages into every sentence for long strings of many conversational turns. I refer to this stew as *translingual* in attempt to defy overly simplified perceptions of speech as consisting of single-language conversation that can readily be translated (and supposedly back-translated in the practice of many instrument designers) in homogenizing ways (Pennycook, 2006). Rather, each southern African speaker has a repertoire of language styles for different purposes.

Translingualism is particularly prevalent in South Africa’s contemporary urban and peri-urban contexts where linguistic realities involve changing borders between

languages (Mesthrie, 2015) with several ever-evolving vernacular languages that the South African census does not recognize (Beyer, 2014). It seems likely that a new national language will evolve throughout much of South Africa, a language that some have suggested will be Tsotsitaal (Hurst, 2014). The centrality of these evolving languages to youth identity gives rise to hypercomplexity that contrasts with languages of education.

Language in education policies. Apartheid policies for the use of language in South African education were the most significant means of imposing political power over the country's non-white population (Greenfield, 2010). Therefore, understanding the role of language in South African education is important to understanding the nature of research literacies and the historical dominance of languages that remain in South Africa. Prior to 1976, all students who matriculated from high school were required to do so in an English or Afrikaans medium. After 1976, students legally classified as *white* or *coloured* continued to have the option of matriculating in an English or Afrikaans medium, but those classified as *black* were required to matriculate in an Afrikaans medium. Changing school language for matriculation required a more academic style of Afrikaans than students were exposed to outside school. The highly open-ended nature of South African matriculation exams (think: South African disposition toward open-ended data), in contrast with U.S.-style multiple-choice questions (think: U.S. disposition toward standardized research instruments), further accentuated the issues. This quick and sudden requirement, in the face of both English and Afrikaans official languages, was strong and immediately led to riotous upset that led to the demise of apartheid in 1994 (Boers, 2009).

In 1996, South Africa's constitutional Language Plan Task Group promoted adding multiple languages for schooling purposes (Greenfield, 2010). However, in an effort to compromise following the lack of compromise apartheid afforded, South Africa's 1996 constitution and more recent policies have embraced a voluntary and non-prescriptive approach to implementation (Beukes, 2009). Although national policies place high priority on historically marginalized languages, the 1997 Language in Education Policy allows mother tongue learning for only three years (Bloch, Guzula, & Nkence, 2010). Furthermore, implementing a mother tongue approach in classrooms where students speak perhaps ten different languages, and where the teacher may be of a different linguistic background than the students, is challenging. In South Africa's hyperlinguistic contexts, *mother tongue* is not a single language that western onlookers would view as distinct, in part because learning a mother tongue requires at least twelve years (Heugh, 2000). In reality, South African children have only until about the age of eight before policies expect them to learn all of their subjects in English.

Children may spend their formative years speaking many different languages among those spoken by their father, mother, traditionally highly-involved extended family, caregivers, and the wider community to which they are exposed (Kamwangamalu, 2004). They may have different mother tongues for different speech communities or at different times in their lives (Ricento, 2002). Based on personal observation among family friends, and in elementary schools, children of southern Africa often want to speak English because it is the language of the global northwest and is perceived as a ticket to their future global mobility, prosperity, and success (Blommaert,

2007b). These motives are stronger in margins of the world where language choice is based on languages speakers want, need (or perceive they need), have, and can get.

Regardless of the intentions of policies, schools, or teachers, the reality is that languages are constantly mixed in South African classrooms (Heugh, 2000), as in all aspects of life. For teachers, the impossible requirement of teaching entirely in English but practicality requiring use of other languages is “schizophrenic” (p. 41). This schizophrenia is further complicated by different languages and hyphenated languages spoken across students in any given classroom (Hornberger, 2002).

Higher education prioritizes the colonial languages of English and Afrikaans, further disadvantaging students who have already been disadvantaged by lack of education in their families’ histories (Greenfield, 2010). These institutional practices continue to impose political, ideological, and economic agendas of language policy. The worldviews of the dominant English language infiltrate the reproduction of knowledge in the academy.

Education

In addition to language issues, the structure of South African schools exemplifies the past and present of race-based logic and the country’s ongoing and increasing anti-immigrant xenophobia (Soudien, 2012; Vandeyar & Vandeyar, 2015). I specifically discuss historical and current aspects of education followed by higher levels of education.

Historical and current education. Historically, African education has been based on ways of knowing that differ from a universal scientific model of engaging claims to objective, reason-based, or empirically verifiable knowledge (Milhouse, 2001). Colonizers viewed African education as primitive because it lacked goals and learning

processes of European education, and lacked formal structures of western-style professionalism. The global west cultivates knowledge through external means whereas Africa seeks to understand life from internal perspectives. Colonizers dismissed African ways of knowledge acquisition not worthwhile for educational purposes. Coming full circle, many principles that U.S. educators now seek to incorporate in teaching and learning were part of African traditional education (Milhouse, 2001). These educational traditions embraced community, cooperative, holistic (developing mind, body, and spirit), and recreational learning to recreate self.

To provide a perspective on current South African educational realities during primary and secondary years, I draw on recent correspondence with a Facebook friend who works as an evaluator for the South African government. Dumisani Ndlovu (alias) expressed concern that the top ten students on South Africa's December 2014 matric (end of high school) exams included only "white, Indian, [and] Coloured" but no "darkie" students. In trying to reconcile that perception with my participants' comments concerning lack of literacy, I asked Dumisani whether lack of parental education would hinder the academic performance of current generations. Although academic literacies require complex discourses, identities, and values beyond language skills (Henning, Mamiane, & PHEME, 2001; Loopoo, 2011), I suspect the following response from Dumisani (that I share with permission) may reflect a single-dimensional view of literacy as reading:

Debbie it's 21 years into democracy. We can't be using Apartheid as a excuse anymore otherwise we r never gonna get anywhere. The matriculants of the past year are the second product of new democracy. *All their parents are literate*

[emphases added]. I think parents r now chasing their careers and working more hours and don't have time for their children. I also think kids today r more into social networks, sex, alcohol, drugs etc than focusing on school and get good grades.

As in any sociocultural environment, managing South Africa's continually changing milieu in cultures of learning requires courage to express and allow dissent, and to abandon previous certainties for unknown realities (Weeks, 2012). In ever-changing environments, education needs to provide skills for adapting to change more than providing static knowledge (D. Thomas & Brown, 2009). Consistent with African worldviews, this involves "learning to become" more than "learning to be" or "learning about" (D. Thomas & Brown, 2009).

Higher education. Insight into South Africa's higher education system will help readers to understand the formation of South African mixed methods researchers. Since the fall of apartheid, South Africa's university system serves urban areas more than rural (Jansen, 2004). This system fails to train researchers who understand and relate to many rural dwellers whose styles of living and responding to inquiry differ drastically from those of more westernized urban dwellers.

Specifically, South African higher education sequence involves a three-year undergraduate degree, a one-year honours program, a one- or two-year master's degree, and a doctoral degree following a British approach (Machel, 2006). Doctoral programs include little or no coursework. Students study independently and write a dissertation (often called a *thesis*) under the tutelage of their advisor.

Two South African organizations provide financial incentives to institutions of higher education, faculty researchers, or their research groups: the Department of Higher Education and Training that specifies acceptable journals in which faculty members may publish, and the National Research Foundation (NRF) that rates members of the academy (Visser, 2007). Ratings and incentives encourage faculty members to publish in journals that address western academic audiences and that are based on scientific rather than relational ontologies. This in effect represents infatuation with all things western and requires technical specialists (Connell, 2007, p. 118).

Social History of Research in Africa

In this section, I move to aspects of African research that look through historically-focused epistemological lenses, leaving characterizations of methodologies and methods grounded in current South African life for the discussion chapter. Although promoting a single center of world thought (such as Afrocentricity versus Eurocentricity) promotes more universal homogeneity than does multi-spheric thought (Davies, 1999), an overview of such views of research will help readers to both understand related conversations and consider strands of thought that weave into contemporary South African research. Accordingly, I briefly discuss views of Afrocentricity that have posited broad essences of diasporic thought against a bifurcation of Eurocentricity with the latter including a broad-sweep of North America and U.S.-centric thought, as Ani (1994) explains. These models of thought have also been applied to distinguishing the history of Afrocentric versus Eurocentric research (e.g., Mkabela, 2005 and Muwanga-Zake, 2009). Purpose, participants, questions, and ways in which data is derived may distinguish the two sources of knowledge (Lehman, 2001). I proceed by discussing views of Afrocentric

and of Eurocentric research before moving to views beyond an Afrocentric/Eurocentric research divide and then the language of research in southern Africa.

Afrocentric research. Afrocentricity views people of Africa or of African descent as actors rather than attempting to act on them as Eurocentric constructs have done (Bethel, 2003). Relative to research methodology, Afrocentrism proposes to describe people from Africa, or of African diasporas, from their own perspectives, values, and ideals (Reviere, 2001). Introspection and retrospection are techniques through which researchers can apply Afrocentric research canons (Asante, 1990). While introspection asks how we as researchers define ourselves, retrospection questions ourselves after we complete inquiry, especially because most of us have been trained in exclusively Eurocentric ways (Reviere, 2001). Beyond individual introspection or retrospection, Mkabela (2005) described a *collective paradigm* (p. 187) that determines the pace of research, knowledge construction, legitimization, and the way meaning is processed. Mkabela (2005) also recommends opportunities for seeking elder and cultural committee knowledge relative to the accentuated respect of elders and ancestors in African thought.

Eurocentric and scientific research. By gazing through political, moral, epistemological, and scientific lenses, Eurocentric approaches to science provide partial images of social settings in other parts of the world (S. G. Harding, 1991). Three historical issues involve awareness that science is “socially and culturally constructed, and hence politically implicated”; what defines western science; and post-colonial relativities that prevent science from distinguishing advanced from primitive civilizations (MacKenzie, 2000, p. vi). Western science comprises one but not all ways of looking at natural phenomena.

Western science entered the African continent through South Africa's western cape (MacKenzie, 2000). Missionaries and other travelers who wanted to expand scientific taxonomies spread scientific activities to the interior. In the early 20th century, scientific movements leaned toward racial hierarchy and manipulated white dominance. South Africa's 1910 Census Act allowed the state to manage population units with an "aura of objectivity, independence, and expertise," so that the discourse of knowledge would provide necessary power (MacKenzie, 2000, p. 121). Epistemologies privileged scientific evidence over testimonies of personal experience.

Powers and methods attempted to totally define "racialised knowledge" in the apartheid state (Posel, 2000, p. 116). Between 1930 and 1960, the counting flurry more aggressively controlled the number of African people in urban areas. The maniacal extent of social measurement (assigning numbers to human characteristics) within the grandiose apartheid state entailed epistemology and practice. Bureaucrats attempted to quantitatively and ritualistically measure and classify the population in absurd detail. The state racially disaggregated statistical data to specify the extent of perceived problems and possible solutions. Due to the problem of mass exodus of so-called *urban natives* from rural reserves to cities, the 1923 Natives Act formulaically limited the number of African people allowed in urban areas by the extent of white demands for labor.

In 1965, existing data enabled the apartheid state to relocate 3 and a half million people from urban to barren land (Posel, 2000). Measurement created discrete units of race and gave the appearance of objective science. However, the calculus of labor supply lacked planning, which led to a statistical monster beyond the state's ability to measure. Counting and controlling became haphazard. "Statistics became part of the rhetoric of

authority and expertise” (Posel, 2000, p. 135), but the state’s ability to statistically gaze with intended panoptic completeness (think Foucault’s (1977) panopticon, a circular prison in which the guard can see everyone) was limited. By 1969, the limitations were debilitating, with amateurish ways of compiling data and little ability to interpret (Posel, 2000). Many urban areas were utterly confused about how to practice the instructions they had received. In spite of the intent for statistics to control the daily flux of labor via hard data, labor officials did not use data to make practical decisions. The arithmetic model of labor lacked economic sense. The unreliability of statistical data lingered such that statistics published during the last several decades of apartheid are untrustworthy.

Because black Africans who were viewed as trespassing in areas for which they did not have a pass, tried not to make their presence known, the manager of Johannesburg’s Non-European Affairs referred to *Bantu* people as having an “inborn reluctance ... to be counted” (Posel, 2000, p. 137). Using statistics created “an illusion of precision” in the ability to count the uncountable (p. 137). Although the apartheid state created an illusion of counting categories, the data it generated was not meaningful in relationship to the lives of *African* people (Seekings, 2001).

Beyond an Afrocentric/Eurocentric divide. Although in some ways, an Afrocentric epistemology of research may better address African life meaning, a danger of discussing Afrocentric research is that of minimizing complex and paradoxical differences across the continent and broader diaspora (Stanfield II, 2011a). Furthermore, although I have separately detailed Afrocentric and Eurocentric views, dichotomizing indigenous knowledge and science is problematic (L. J. Green, 2012). The conversations of Afrocentric and Eurocentric views need to inform each other in ways that allow

multiple identities (Davies, 1999) and that, I propose, could generate context-relevant views of mixing or integrating research methodologies (see chapter seven for an interpretation of what this future might look like).

Linguistic contexts of research. As South Africa's apartheid days were characterized by meaningless statistics in an effort to separate people, its post-apartheid days are characterized by densely multilingual realities as people freely move around the country (Blommaert, 2007a). This means that daily life and inquiry may not account for participants' language(s) of origin. Researchers must think less literally about interpreting text that arises from such settings. Much research in South Africa is by necessity cross-cultural given the coexistence of intense cultural hybridity and of more distinctly perceived cultures. Miscommunication and misinterpretation are frequent, due both to linguistic and conceptual differences.

The realities I have discussed in this chapter require researchers to simultaneously address traditional and contemporary systems of thought, but across the African continent many students of research methodology lack academic freedom to choose which research methods they learn (Wagner & Okeke, 2009). Complex heterogeneity explains why research conducted on the continent may do well to embrace a plurality of methods and to situate itself in a participatory approach (Chilisa, 2012).

Chapter Summary

Africa is neither a generic monolithic country nor a collection of individual culturally based countries. Complexity in and across settings abounds, thanks in many ways to the history of mobility within the continent and from other continents. This mobility continues to affect South Africa's realities. Languages are not categorically

distinct. Each utterance draws simultaneously from multiple conglomerations of communication once considered separate languages. Lest we think this does not relate to the global north, consider the possibility that the global north has more severely suppressed historical variety than has the global south. Consider situations where each parent of a mid-life adult comes from separate language origins (primary discourses, according to James Gee, 2014). Assume, then, that the adult was schooled in a 3rd or 4th language relative to their parents' languages, and socially interacts with 5th, 6th, 7th or more languages or secondary discourses. The importance of extended family and socializations enhance the role of secondary languages in southern African cultures (Postma & Postma, 2011). This further begs the question of what the phenomenon of *native language* means (Webb, 2002), with life becoming a linguistic stew.

In research, as in everyday conversation, most people in South Africa speak a language other than that of their first identity. Many people routinely communicate in English as a language that is not their first identity, and may even be their third language. Even formal contexts of English are less-tightly defined and more loosely applied in Africa than in the global northwest, including many non-English words. This challenges use of professional nomenclature and results in less literal meaning and interpretation of words. South Africans know they cannot interpret languages literally, in contrast with those of us outside South African contexts who may speak English more monolingually and who may hence interpret English more literally. The linguistic contexts of research, particularly of mixed methods research with its both less and more structured components, needs to carefully consider hybrid linguistic and sociocultural contexts.

Chapter five now presents findings from the one-on-one semi-structured interviews conducted in a South African English medium among four professors who had published mixed methods studies or advised mixed methods theses. To analyze these interviews, I rely on narrative and discursive analysis. Chapter six will present findings from a corpus of written texts written by authors affiliated with institutions in South Africa.

CHAPTER 5: FINDINGS FROM INTERVIEWS

This chapter presents the findings of the interviews. Within the interviews, and to my pleasant surprise, each participant met me with particular thoughts they wanted to share. Recruitment e-mails that had informed participants of my topic (i.e. hidden aspects of knowledge production contextualizing mixed methods research in South Africa), had stimulated their thoughts, both in relationship to research practices more broadly and in relationship to mixed methods in particular.

Regarding the South African context of mixed methods, talk in languages other than an original tongue results in pauses that may represent linguistic processing rather than an intent to counter or support the dialogue (see Xoliswa Mtose's interview). This tendency illustrated how different features of nonverbal communication accompany different languages (Wang et al., 2009). Hence, I focused on the interpretive meaning of participants' spoken words without regard to non-verbal elements such as length of pauses.

In keeping with the reflection of several of my participants that storytelling is traditionally a way of life in southern Africa, I present findings by narrating or telling the story of each individual interview. In this way, I view the four interviews as embedded subunits of analysis as Yin (2014) and Creswell (2013a) have recommended for qualitative case studies. For each narrated subunit, I begin by discussing the participant's background (see Appendix D) including how I encountered their work. This background provides a temporal and structural framework for the interview and helps to convey what I knew about each participant beforehand. I then move to the scene of the interview in keeping with ethnographic traditions and also discuss initial exchanges (see Emerson,

Fretz, and Shaw, 2011). Finally, I move to themes that surfaced from each interview. In keeping with the sequence in which I conducted the interviews, I start with Brendon Barnes.

Narratives of Individual Interviews

Defining Methodologies as Political Identities: Brendon Barnes

“People from the global south need to add a voice to the methods literature.”

“Methods become the end in themselves rather than the means to an end.”

“The terms *quantitative* and *qualitative* are about an identity.”

“Mixed methods is big business.”

Preparing to interview Brendon. Brendon Barnes completed a bachelor of social science degree at the University of Natal, Pietermaritzburg (now the University of KwaZulu-Natal) in 1996 with emphases on psychology and sociology (Barnes, 2013). Also at the University of Natal, Pietermaritzburg, Brendon completed an honours program in social science with an emphasis in psychology in 1997, and a master of social science degree under the supervision of Kevin Durrheim with emphasis on research psychology in 1998. In 2007, Brendon completed a PhD degree at the University of the Witwatersrand with an emphasis in public health. At the time I interviewed Brendon, in July of 2013, he was Associate Professor of Psychology and Deputy Head of the School of Human and Community Development at South Africa’s University of Rivierplek,⁵ where he had taught since 2008. Since our interview, Brendon has become Professor in the University of Johannesburg’s Department of Psychology.

⁵ Names of universities with which participants affiliated at the time of the interview are pseudonyms, by requirement of the University of Nebraska-Lincoln Institutional Review Board.

I encountered Brendon Barnes's work when I searched Google Scholar for mixed methods studies conducted in South Africa. Two articles drew my attention. First, Brendon's (2012) call for transformative research agendas in South African psychological research impressed me in that he promoted mixed methods to serve that role. Second, Brendon's (2010) implementation of post-trial focus groups after participants in a quasi-experimental control group changed their behavior without receiving an intervention struck me based the depth in which he discussed the Hawthorne Effect.

On a late July day, I arrived on campus early, hoping to print informed consent and protocol documents before the interview. Brendon came immediately to the building from which someone had called to tell him I was waiting. While he walked me back to his office, his cheerful and kind disposition impressed me. He ushered me into his office where he offered to print the documents and where an administrative assistant was extremely hospitable. After making ourselves at home in Brendon's office, we walked to a coffee shop several blocks away. We tried an indoor spot that was too noisy and then moved outside where birds chirped and the ground sported brown winter grass.

I opened the interview by asking how long Brendon had been at the University of Rivierplek, and about which parts of his work he enjoyed most. Brendon said that he found research "very enjoyable" and longed to do more. He also "thoroughly enjoys teaching and finds it extremely rewarding," especially teaching post-grads (*graduate students* in the United States). At the time of our conversation, he routinely taught research methods at the second-year undergraduate and masters' levels, and also taught

health psychology at the third-year undergraduate and masters' levels. He did not enjoy the administrative part of his work.

Relating psychology research to South African context. Brendon spoke of a broad focus in terms of his professional background. He originally studied research psychology “similar to experimental psychology in the United States,” but more multidisciplinary and with heavy emphasis on methodological pluralism that drew his attention to research. During his student years, psychologists were concerned with the place of psychology relative to other disciplines. It really bothered Brendon that methods “played a huge part in thinking about” psychology as a discipline, in an “incredibly quantitative way.”

Brendon related that he became disillusioned with the inward focus of psychology as a discipline, was more interested in what psychology could offer health concerns, and pursued a PhD in public health. Brendon's interest is in how psychological concepts and methods can address key issues for the health of South Africans, rather than in psychology per se. He is particularly interested in environmental health and “basic living conditions that many South Africans face.” He is “one of the few psychologists in the world” who is interested in and has worked “a lot” on the influence of household energy sources. He particularly studies the influence of environmental lead and mercury exposure, and has studied the influence of water pipes and smoking.

As Brendon pointed out, in South Africa and the rest of the continent, most people continue to live in desperate conditions. “South Africa is broad and diverse and unequal,” so answering questions about the relationship between methods and South African life in general is very difficult. Researchers need to think about this relationship. Sometimes

South African researchers “get it wrong.” Each researcher’s substantive area and particular focus of study—as in Brendon’s study of firewood, water, and electricity—affects their use of methods. Brendon’s approach to research is realist and pragmatic. He believed that a particular method should “address a particular kind of question.”

Beyond ethnic cultures—such as Zulu and Xhosa (two of South Africa’s official languages)—Brendon said that understanding the dynamics of *disciplinary cultures* is also very important. For example, anthropology is “practiced very, very differently methodologically” than is psychology. The discipline of psychology exerts a “really important” effect on the practice of research methods in South Africa, a discipline that remains somewhat dominated by quantitative approaches. Psychology in South Africa is more similar to psychology practiced in the north than that practiced in South American contexts. South African psychologists tend to think they should increasingly emulate the disciplinary and methodological practices of the United States. However, psychology is a broad discipline and Brendon believed “there are other ways of doing psychology.”⁶

Politicizing communities of scholars.

Identifying with communities of scholars. Brendon defined *qualitative* and *quantitative* in ways that are “as much about an identity as about real difference between ways of looking at the world.” He promoted asking rather than telling students about differences. He perceived qualitative and quantitative as more similar than different,

⁶ I clarified the meaning of this passage with Brendon through member checking. In a similar vein, I interpret that he does not think South African psychology needs more objective psychological assessment based on his comment that “we may fail to agree that psychology should strive for a more scientific basis” in response to his interview with Saths Cooper (Barnes & Cooper, 2014, p. 332).

depending on the researcher's paradigm. Communities of scholars hold to these identities saying, "we are quantitative or we are qualitative."

The choice of South African researchers to identify with quantitative, qualitative, or mixed methods depends on their disciplines. Quantitative methods strongly dominated psychology in South Africa during the time of his studies,⁷ and to some extent continue to dominate now. Brendon referred to his Barnes (2012) article in which he reported analysis of the 275 articles published in the *Journal of South African Psychology* between 2005 and 2010. He counted 70% quantitative, 10% qualitative, 3% mixed methods, and many review articles. Truly mixing quantitative and qualitative methods is particularly rare. Many people use both approaches without drawing on the corresponding debates.

When I asked what Brendon thinks of when he hears the term *mixed methods*, he articulated that he finds political aspects more interesting than technical aspects. Where the movement locates itself is more important than technical debates. South African researchers use mixed methods in part because the political nature of funders, particularly AIDS organizations and those of British background, increasingly expects mixed methods.

A less technical benefit of mixed methods is that it has "shaken up" what it means "to be quantitative and to be qualitative." Brendon is highly anxious about "the flames of the paradigmatic war." He does not want to hear a large group of mixed methodologists saying, "that's how you solve all of South Africa's problems." Such paradigm fights form

⁷ (Brendon completed his master's degree in research psychology in 1998 and his PhD in public health in 2007)

a third camp. Brendon said that such people should “go to hell” for promoting mixed methods as the only approach to research.

Practically, Brendon said South African researchers implement mixed methods because the problems they face are so complex, a motivation he also observed in southeast Asia. The layered nature of problems requires “an incredible amount of skill and flexibility to unpack.” Understanding is very difficult to gain by using only one particular method. Brendon believes that mixed methods provides better understanding, and that implementing mixed methods assumes a relatively good understanding of both quantitative and qualitative approaches before mixing. The benefit of mixing methods in South Africa is enormous.

Interacting between funders and participant communities. Communities of scholars embody an identity issue when they hold onto ideas that “we are quantitative and we are qualitative.” Although views of difference or similarity vary by paradigm, as with post-positivist (seemingly perceiving more difference) or post-modernist (seemingly perceiving less difference), Brendon believes that quantitative and qualitative methods are more similar than inherently different in everyday engagement. Relating to the debate of whether “*I’m quantitative* or *I’m qualitative*,” researchers must understand “the politics of identity amongst different communities of scholars.”

Brendon went on to say that “all research is political on some levels.” He said that the political aspect of research is a vague concept. Methods play “a huge part” in political aspects of studies. To move toward specificity, Brendon recommended that South African researchers ask whether “a big funder is just trying to spend money and

demonstrate to someone else that they do good work.” The political nature of research is situated in the knowledge economy.

Mixed methods itself, and likewise quantitative methods, is part of an economy of big business. Textbooks, journals, and conferences are all political. The way researchers write and disseminate information is also political. Without acknowledging this, researchers are “kidding themselves.” Scholars must start thinking more broadly about philosophy and consider “the political dimensions of mixed methods” because certain funders make certain demands. Scholars must also think about “the market and who consumes these methodological orientations.” Brendon finds it “cool” that more and more emphasis is being placed on mixed methods in terms of broadly applied research. However, methodologists must avoid “creating the same problems as the qualitative/quantitative debate” by saying “I’m a mixed methodologist” (see Reichardt and Rallis (1994) concerning the *qualitative-quantitative debate*).

Funders have very clear ideas, especially in big intervention research. They want to come into a situation, quickly define and do a project, and get results. An example of politics influencing research in South Africa is when funding organizations promote mixed methods over other approaches, treat South African researchers as second rate, appoint themselves as principal investigators, or disregard South African realities.

Brendon looks at a bigger picture than do funders. Playing the funders’ games is especially tricky in an evaluation setting. Among studies for which funding originates outside the country, African researchers are generally “not asked to be the principal investigator.” Their role is to manage fieldwork or to work in a hierarchical structure. In some ways this provides “an incredible amount of leverage” and in other ways not.

Brendon is “quite critical” of the status of South African researchers “as glorified field workers.” Especially in applied work such as program evaluations, participants, fieldworkers, and those funding or promoting studies may all come from different positions, thus comprising “the politics of the knowledge economy.”

Really applied work requires many levels of go-betweens including community workers or community researchers, Brendon said. People at each level of involvement have different pictures of what a situation entails. To counter political aspects of studies, Brendon recommended that researchers in South Africa focus on translating their ideas in ways funders can understand. South African researchers serve as cultural brokers, cultural interpreters, or cultural translators, conveying participant meaning and research results to investigators from outside African contexts. Qualitative data helps explain and interpret what’s happening for funders or principal investigators. Situations inherently require South African researchers to explain context, a process with which mixed methods helps.

Although some very good South African researchers are principal investigators, younger South African researchers need to know that they will often not be in control, which begs the question of “who gets to publish and under what conditions,” Brendon said. How does work get disseminated? Answers to these questions profoundly impact researchers’ professional trajectories. CVs often distinguish consulting work (where researchers are not in charge) from academic work (where they may be in charge). Because all experience is valuable, this distinction is sad. The principal investigator in charge often has a very different or no picture of what goes on in a South African context.

Brendon said that globally southern researchers need to “add a voice to the methods literature, rather than just regurgitating what comes their way.” The International Journal of Mixed Methods Research includes few voices from the global south even though many people on the African continent conduct mixed methods. In parts of Africa outside South Africa, academics consult a great deal to supplement incomes. Due to the instability of the higher education system, “some people don't get salaries some months.” They serve as consultants but actually *do* mixed methods. They have not been allowed to say, “This is how we think mixed methods are done.” Although he did not want to “over-essentialize the global south,” Brendon said that mixed methods literature includes “very, very, very few voices” from African or South American circles. It is very difficult for globally southern voices to be heard in mixed methods literature. Occasionally, someone “from the U.K. writes about doing work in Africa” and its related methodological implications, but globally northern writers do not come from a globally southern mindset. “We must be careful not to overgeneralize by calling all of us the same in the global south, but we have a lot to offer.” From another angle, Brendon was unsure “how many people from the global south want to publish” in globally northern journals. Perhaps researchers from the global south are not submitting articles and hence their voices are not heard.

Training in mixed methods. Brendon discussed the formation of South African researchers in higher education by saying that they start learning about qualitative, quantitative, and mixed methods during their second undergraduate year. The honour's program, between the bachelor's and master's degrees, includes a short section on methodological approaches and requires a quantitative or qualitative research essay.

Students who pursue an honours degree are typically not allowed to conduct mixed methods studies because of the perceived complexity and difficulty of those studies. Even post-graduate (masters and doctoral) work is expected to be neat and contained. At the master's level, qualitative or quantitative approaches alone are perceived as fine, but mixed methods approaches are perceived as creating all sorts of problems. At the master's level, and to some extent at the PhD level, training is "about being a generalist." Because South Africa does not "have enough social scientists or researchers to do everything," researchers need to know quantitative, qualitative, and mixed methods without specialization.

In discussing the formation of Brendon's own methodological pluralism, he said that he was not widely exposed to international authors, other than Michael Quinn Patton, who was a strong impetus for him learning to think differently about qualitative methods. During his master of social science program, Brendon and other students read Alan Bryman's work extensively. They did not read John Creswell much in the mid-'90s (given that Alan Bryman first published on combining or mixing quantitative and qualitative methods in Bryman (1988) prior to John Creswell's first such publication in Creswell (1994)). On a local South African level, Kevin Durrheim and Linda Richter stimulated his research involvement during his master's program.

Beyond reading, Brendon applied mixed methods through his own work and says that mixed methods saved him (i.e. his studies) a couple of times. For his PhD thesis, he used a quasi-experimental trial to develop and implement a behavior change in a community and in turn reduce childhood exposure to wood and coal fires. The control group demonstrated "a huge Hawthorne Effect" that he did not understand. As a result,

the quasi-experimental trial was a disaster. Rather than giving up, Brendon conducted a large qualitative study (for an explanatory sequential design, see Barnes, 2012) among both comparison and control groups, both of which had changed their behavior. Brendon was fascinated by the findings of adding the qualitative study provided fascinating insight.

Doing mixed methods in psychology. Brendon led into a discussion of mixed methods in South African psychology implicitly by referring to his Barnes (2012) article, *Using mixed methods in South African psychological research*. He said this article had generated a love-hate relationship in South Africa. Those who hate the article believe Brendon has created something (i.e. mixed methods) that does not exist. Among those who received the article warmly, nine invited Brendon to give related presentations within the first six months of the article's publication. Brendon was curious to see how the small field of psychology, which he considers parochial in South Africa, would accept this mixed methods article.

Brendon believes that mixed methods needs to be done properly, and said that people in South Africa who think they are doing mixed methods are doing "quite a shitty job of it." As in his article on mixed methods in South African psychology, Brendon raised three concerns. His first concern is the research question. Researchers need to relook at the political and ethical nature of questions they ask and how those questions have arisen, especially questions that blame people who live in poverty and that involve mixed methods. Perhaps funders should upgrade people's living conditions "rather than doing a particular type of study that implies that people living in poverty are responsible or to blame for their circumstances," Brendon suggested.

His second concern about mixed methods in South African psychology is design. Many South African researchers say, “*I used a quantitative study and I used a qualitative study*” without framing a design (e.g. sequential exploratory). More specifically regarding study design, Brendon thinks South African researchers “can learn a lot from what’s being written.” A lot of existing material is useful. The ability to label a study design is important. Beyond labeling a study as “quantitative followed by qualitative,” Brendon said it would be “extremely useful” to describe a study’s strategy as nested concurrent or sequential exploratory. Such labels force researchers to think through details of mixing, rather than only thinking of two separate studies in one. Even in qualitative studies or components of studies, researchers must clarify their choice of labels. For example, two of Brendon’s colleagues claim to be discourse analysts. “Put them together in a room and see the fight that happens” because they come from two very different philosophical approaches. Sometimes researchers “clump everyone into the same methodological basket.”

Brendon’s third and final concern about mixed methods in South African psychology is quality. South African researchers have ideas about what comprises a good mixed methods research question in technical terms, but the issue is how to ask the kind of questions that South Africans think are important for the development of their country or their cities.

Decontextualizing methods. Brendon worries that globally northern “methods journals decontextualize methods from context” and said it is “really important” to think through. The issue stems largely from epistemological stances, from differences across paradigms, and from the way researchers teach. Brendon mentions a table in the

Handbook of Qualitative Methods (I assume *The Sage handbook of qualitative research* (Denzin & Lincoln, 1994, 2000, 2005, 2011b)) that shows methods as separate from ontology and knowledge, a concern that “plays itself out in very profound ways.”

Brendon’s article published in the *International Journal of Social Research* and titled *The Hawthorne effect in community trials in developing countries* (Barnes, 2010), exemplifies this decontextualization. Brendon was particularly interested in the reviewers’ comments. His initial submission stated that due to finding a “massive” Hawthorne effect in a quasi-experimental trial, he had “used qualitative in relation to quantitative.” Participants had told Brendon that they did not want to just change their behavior; they wanted electricity and water. The lesson was as theoretical as it was methodological. Brendon believes that globally northern journals “want to get rid of” theoretical lessons. In contrast to these expectations of globally northern journals, Brendon considers the outcome participants wanted from his study as more important than the helpfulness of mixed methods. Before publishing, he obliged the request of the *International Journal of Social Research* by excluding the discussion of what participants wanted. This example illustrates how methodological literature dilutes research to the point of being about methods. “Methods become the end in themselves rather than the means to an end.” As an example of decontextualizing research from contexts, globally northern methodologists have “plucked” Brendon out of South Africa and put him in Uganda or Kenya or India saying, “do a study there” without considering what he as a researcher knows about the contexts of the study.

As with globally northern publications, so some of the master's students at Brendon’s university have “incredible technical knowledge.” They can “do” multivariate

statistics and structural equation modeling, but they “can't answer a research question that is posed to them.” When presented with a problem, students find it really difficult to solve. They often become “so paralyzed with methods that they forget” what they set out to do. Methodologists are often exposed to an ontology of methods rather than to an ontology of the social world or of life as a whole.

Ticking the box for ethics. Brendon is particularly struck by western ethics and informed consent processes that have become a “tick-the-box exercise, where in many instances researchers are advised not to give too much information away, because it's going to bias our study.” Brendon has “a major problem with doing research with an informed consent form that goes to an ethics committee that says, ‘Take this out. You giving too much information’ or ‘You giving the wrong information’ or ‘This should be more anonymous.’” The situation becomes very difficult because “in practice, research unfolds quite differently.”

In urban townships (historically underdeveloped areas on city peripheries), participants are often “over-researched,” Brendon said. For example, in Johannesburg’s Alexandra suburb,⁸ Brendon had conducted four or five studies, because he knows the context. “Imagine how many studies have been conducted there,” Brendon exclaimed, and yet people continue to live there, despite the very unfortunate conditions. Review boards do not address level of ethics involving participant expectations and over-research.

⁸ Alexandra is a former *township* built as a labor pool for Johannesburg (Curry, 2012) and that continues to lack water and sewerage systems (Pinchuck, McCrea, Reid, & Velton, 2012).

Brendon discussed a study he had worked on in Uganda and in which he felt ethically compromised. The study sponsors had asked him to design a behavioral intervention that he “didn’t think would work.” Instead of implying “that people living in poverty are responsible or to blame for their circumstances,” Brendon felt that the “enormous amount of money” spent on the study should have been used to upgrade community living conditions. Many behavioral interventions attribute blame. For example, funders may imply that the cause of diarrhea is not washing hands properly rather than considering the absence of clean water or sanitation, or inadequate nutrition.

Giving insufficient information to participants often “leads to misunderstandings about studies, especially in contexts of poverty where participants are over-willing and falling over themselves to participate rather than the other way around,” Brendon said. Participants in poor communities “gush” when researchers arrive because the participants “expect something to come of” the study. Although studies may not provide “an immediate benefit, in many instances participants will think, ‘Well, you from America. Maybe you’ll tell the American government when you go back, or you’ll tell the South African government to please fix our schools.’” In impoverished contexts, Brendon is “always struck” by how much “people want to participate.” He feels badly when he knows that participants’ lives will not necessarily change, or may change only indirectly due to a study. Researchers must “understand why and how participants participate.”

Perceiving realities and understanding interactions. Brendon believes there is “a real need for researchers to understand how and what actually happens when research unfolds” from the time of informed consent to the process of people answering questions. For example, assume an interviewer asks participants to “Please rate your dwelling in

terms of, are you satisfied or are you not satisfied, from zero to ten, with ten being good.” A participant may live “in a shack and say ‘ten,’” to which the interviewer may say, “Can't be ten! You are living in a shack! How about five?” The participant may say, “I think, ten.” The interviewer will then say to the participant, “Listen, I think you should change your answer to two, because if government sees that everyone's saying *ten*, they are not going to upgrade your dwelling.” The participant will then say, “OK, OK. Put two down then.” I believe the point of this illustration is that differing agendas of stakeholders, researchers, fieldworkers, and participants directly impact the representation of perceived reality, especially in the complex socioeconomic realities.

Brendon said that, “research and data collection is interactional, not just someone sitting there asking questions of and extracting the truth” from a person. Answering questions involves “a whole bunch of interactions, and motives dancing around.” An enormous amount of research needs to be done on that.” Brendon concluded by saying that in addressing questions about response processes, “mixed methods can be extremely useful.”

Summarizing Brendon’s interview. Early in our interview, Brendon Barnes spoke of his disillusionment with the “incredibly quantitative” nature of psychology as a discipline, and of his interest in methods serving the needs of people who live in desperate conditions. Brendon quickly referred to qualitative, quantitative, and mixed methods communities of scholars as identities. In South Africa, these communities of scholars are expected to serve the demands of politically influential funders, and to go between those funders and participant communities. Funders are the want mixed methods and may treat African communities of scholars as “glorified field workers.” Publishers

also play a role in the knowledge economy and decontextualize methods by diluting to an end rather than a means to an end. Brendon said that ethics have become a “tick-the-box exercise,” and instead need to consider issues of blaming people for their circumstances and of over-research. The usefulness of mixed methods, Brendon concluded, is in making research an interactional event that considers participants’ motives in answering questions.

Not Doing Slap-Dash Work: Amanda Gouws

“You can't just go in there and do slap-dash work because you're working with an indigenous population.”

“The influence of the west is viewed with a lot of suspicion because it is very often seen as white western imports.”

Preparing to interview Amanda. Amanda Gouws holds bachelor (1982) and master of arts (1985) degrees from Rand Afrikaans University (now the University of Johannesburg). In 1991, she completed a PhD degree from the University of Illinois in Urbana-Champaign. She is full professor of political science at First University (pseudonym) and has also been a visiting professor at Northwestern University in Chicago. Her most well-known books are *Overcoming intolerance in South Africa: Experiments in democratic persuasion* (Gibson & Gouws, 2003) and *(Un)Thinking citizenship: Feminist debates in contemporary South Africa* (Gouws, 2005).

I heard of Amanda Gouws when I encountered Gibson and Gouws’ (2003) *Overcoming intolerance in South Africa: Experiments in democratic persuasion* several years ago. When I searched for mixed methods theses and dissertations, I saw that Amanda had supervised Angelique Wildschut’s (2011) mixed methods dissertation

entitled *A feminist investigation into the reasons for attrition of women doctors from the South African medical profession and practice: Exploring the case of UCT medical school between 1996 and 2005*. When I read further about Amanda's work with political science and women's issues, I decided to contact her.

Upon meeting Amanda at a quaint coffee shop near First University, I bought coffee for her. She struck me as highly reflective. Even before we started the informed consent process, she was eager to tell me that methodologies do not stand alone and that they must be informed by theory.

Gaining multidisciplinary training. Amanda and I began the formal, post-consent part of our conversation by talking about multidisciplinary aspects of her work and training. Disciplinarily, she said her work encompasses political science and gender studies. As a political scientist, Amanda was trained in and often uses quantitative methodology. In gender studies, she was trained in qualitative methodology. Of the two methodologies, she uses qualitative more often. She also works with sociological and psychological theories.

Amanda had the good fortune of attending the Rand Afrikaans University, now the University of Johannesburg, where she was able to study with Professor Henry Coetzee (now at Stellenbosch). Henry Coetzee had just returned from England with quantitative training and kindled in Amanda an interest in quantitative research. This quantitative foundation enabled Amanda to study in the U.S., without which Amanda would not have had the broad quantitative and qualitative training that put her "speeds ahead." Contrasting with a South African dissertation-only approach, Amanda said the

U.S. approach of coursework and its “very serious training in methods makes for a different type” of education.

Theorizing methodology. Amanda said she felt strongly that methodology should not be used “for the sake of methodology” but that it must be informed by theory. “Crass positivism” that arises without theory is seriously problematic, especially given South Africa’s “huge” bias against positivist methods and willingness to criticize the same, Amanda said. Using quantitative methods requires “demonstrating something,” relative to theory, I interpret. Amanda said she would pose a deductive approach to quantitative methods.

Because Amanda has worked in gender studies, she has been “strongly influenced by feminist standpoint theory,” which requires “reflecting on what you are doing,” and “putting yourself in the shoes” of your participants. Amanda said that researchers cannot “go into the field without accounting for” the nature of the participants with whom they work. South Africa encompasses “very great class disparities.” There are “racial issues, language issues, and low education levels.” Approaching participants with “very abstract concepts” leads to problems, Amanda said.

Feminist standpoint theory has much to offer work with indigenous populations. Standpoint views are helpful even when excluding feminist aspects that often cause researchers to avoid the theory. Amanda articulated that standpoint theory differentiates “the context of discovery” and “the context of justification.” The context of discovery pertains to the questions a researcher asks. The context of justification pertains to the methods a researcher uses. Amanda explained that the context of discovery requires building the research question with “sensitivity towards the research context,” whereas

the context of justification includes “all standardized methods.” Replication and rigorous research are very important; hence the importance of “standardized methods that can be replicated.” “You can't just go in there and do slap-dash work because you're working with an indigenous population,” Amanda emphasized. The methods must accommodate the study's participants.

Accommodating context of justification to context of discovery. To illustrate how she has accommodated standardized methods for a study's participants, Amanda leaned toward and put her hand on *Overcoming Intolerance*, a highly quantitative volume that she published with James Gibson (2003). The two authors disagreed about how to conduct the study given that she knew the South African context but her co-author had methodological expertise from an American context. Translating the questionnaire into seven languages was “prohibitively expensive,” Amanda said. Using a “double blind technique” in which “one set of translators translates into a language” and another set translates back to the original language of English, is “enormously expensive.” Meaning is lost if overlap between the original and the back-translated versions is not “about 90%,” Amanda said. To assess the validity of the translation process, Amanda and James engaged a team approach involving “a number of translators.”

After translating, Amanda and her co-author used focus groups to pilot the questionnaire⁹ on a subsample of participants. As principle investigators, they were both

⁹ Note that Amanda did not mention the terms *mixed* or *combined* in relationship to the *Overcoming Intolerance* study. The study involved focus groups to develop a questionnaire, according to Amanda's interview, while the book mentioned only *pretest interviews* without the terms *focus groups*, *qualitative*, or *quantitative*. This exemplifies the complexity of relying on literal discourse to derive larger

present throughout the pilot process and did not leave pilot testing for other people to do. Without the presence of disciplinary experts, pilot testing can result in “very strange things.”

The *Overcoming Intolerance* study became “very tricky” when, as Amanda exclaimed, the first pilot took close to three hours for people with post-graduate education. Amanda realized that for people who were “illiterate” or who had “low levels of education,” the questionnaire would take much longer. “You cannot use three hours of somebody's time,” Amanda said, explaining that participants would lose interest after half an hour. “Because of the complicated research design” with a time-consuming experiment embedded in a survey, the investigators “couldn't make the questionnaire much shorter.” The final interview took close to two hours for people who were “less educated.” Amanda said that she and James Gibson, her co-investigator, do not know how much they lost “in terms of just interested honest responses.” Researchers need to be cognizant of how much “less educated or illiterate people” can absorb. In South Africa, representative samples must include people with less education. During the years in which the study was conducted, immediately after the dismantling of apartheid in 1994,¹⁰

meaning, especially in trying to determine what methods or methodologies a researcher has used. I surmise that the origin of Amanda's quantitative training in a political survey perspective inclined her to use terms such as *focus groups*, *pretest interviews*, and *questionnaires*, instead of *qualitative*, *quantitative*, and *mixed methods* when either set of terms would be possible depending on discipline and traditions of academic disciplinary formation.

¹⁰ Gibson and Gouws (2003) conducted their study between 1994 and 1996.

the majority of “black Africans” did not have high levels of education, though that has changed, Amanda says.

Sampling for *Overcoming Intolerance* “was very professionally done,” Amanda said. Even with a marketing company that had “all the appropriate infrastructure and the logistics,” the large sample size required “a very long” field period. The resulting data set “was huge” and also required a long time to analyze. As is very often the case, another issue was whether to “reward people by giving them money.” If so, the question becomes whether to “tell them beforehand or afterwards.” Amanda and her co-researcher decided against giving money. They gave something afterwards, which Amanda thought was “vouchers for food.” The extent to which an incentive “impacts people's answers” is always an issue. Participants participate “just for the incentive,” so most South African researchers agree that incentives should be provided after a participant has completed a study. The issue then is how to “deal with people who have low levels of education.” Thus the self-reflexivity of the feminist standpoint is so important. During post-pilot fieldwork, researchers cannot self-reflect. However, Jim (as Amanda referred to him) and Amanda personally trained field workers and field managers, rather than leaving that task for the marketing company.

Jim and Amanda conducted the *Overcoming Intolerance* study in many different parts of in the country, including “very deep rural areas,” Amanda said. Field managers were “in control of the surveys at all time.” In a case where a field manager “did not do what he was supposed to do,” Jim and Amanda had the person “fired and research in the area repeated” due to clear problems with the corresponding surveys. As principal

investigators, Jim and Amanda “really did checks and balances.” The study was “very, very time consuming” but that is part of what “rigorous research” means.

***Biasing towards*¹¹ quantitative or qualitative approaches.** Amanda defined quantitative studies as using closed-ended surveys in which numbers play an important part and the results are analyzed “with true statistical methods.” She defined qualitative studies as open-ended. Quantitative coding “happens before the time” of data collection, whereas qualitative coding happens after. Ensuring that “codes are consistent across interviews” makes qualitative coding “incredibly time consuming.”

Amanda opined that the U.S. bias (inclination) favors quantitative approaches, while the balance of qualitative and quantitative approaches among social science researchers in South Africa depends on the discipline. In gender studies, Amanda said the South African “bias, and I mean bias in a positive sense, is towards qualitative methods.” The bias in political science also favors qualitative approaches.¹² The assumption is that everything other than qualitative work is “inferior,” a complete and very problematic misunderstanding. Political scientists have “a huge stigma” against quantitative approaches due to the “very positivistic” nature of those approaches. The stigma is based

¹¹ Among the five times Amanda used the word *bias*, four implied *leaning towards* rather than *leaning away from* an idea.

¹² Seekings (2001) and Gouws and Gibson (2001) confirmed the hostility toward and tendency of South African political science away from a quantitative emphasis. Harkening to the nature of apartheid-era research that I described in chapter four, Gouws and Gibson (2001) describe weakly conceptualized and mostly descriptive statistics during later apartheid years. Seekings (1997) asserted that the concern of scholars of that era with race-based studies of politics left them unconcerned with voters’ attitudes or individual decision-making processes.

more on “ignorance than on having used [a quantitative] system.” Due to “lack of quantitative training,” not many South African researchers have the ability to use quantitative approaches. Relative to other disciplines, political scientists have less and sociologists more quantitative training. Most researchers with the ability to use quantitative approaches “had their training abroad.” Stellenbosch University and now the University of Cape Town are the only South African universities who train political scientists in quantitative approaches, Amanda said. Sociology is less stigmatized against the “positivist issue” and promotes “a lot” of quantitative work.

Amanda selects methodologies that “give the best results for the research problem.” She said she has often used “a combination of quantitative and qualitative approaches.” Based on the context of her single reference to “qualitative and quantitative” in Gouws, Kotze, and van Wyk (2013), on one hand I suspect that Amanda’s reference to “a combination of quantitative and qualitative approaches” may have referred to selecting different monomethod approaches for different studies rather than “often” combining quantitative and qualitative approaches within a study.

Other situations, such as the study Amanda conducted among HIV home-based carers,¹³ require contextual understanding. A questionnaire would have provided no value absent an interest in broad generalizations. The complexity of the South African context, relative to the plurality of race and class, for example, requires qualitative approaches, as Amanda stated.

¹³ Amanda has published several studies on a “feminist ethic of care,” including Amanda Gouws (2012, p. 269).

Exemplifying a feminist standpoint theory for a qualitative study among “indigenous populations,” Amanda described working with one of her doctoral students who “looked at conditions of home-based carers,” around which government policies revolve. “The conditions are quite appalling,” Amanda said. She and her student recruited from a rural, an urban, and a virtual gay community. Fieldworkers were HIV positive, and came to Stellenbosch for a week of training in research methodology during which they learned about research questions and about their jobs as fieldworkers. Although they “did not have high qualifications,” they gained understanding before going into the communities. Interviewers had to identify full-blown AIDS patients who needed constant care, their corresponding home-based carer (a friend or family member), and someone at the local clinic. The design incorporated a “transect walk,¹⁴” looking for what the vicinity of an HIV/AIDS patient could contribute. The study looked for clinics and health facilities, places of leisure, and grocery stores to provide an understanding of the environment. Amanda and her student checked that the three fieldworkers correctly represented each focal HIV/AIDS participant prior to the interviewers conducting the open-ended interviews, after which the interviews were coded with Nvivo. What is important, Amanda said, is that they “gave something back to the community.” Training interviewers, many of whom were unemployed and who “now work for other researchers as field workers,” gave them “skills they could use in the future.” After collecting data, Amanda and her student “sat with” the interviewers to gain “their impressions of the questionnaires, of what happened, and what they saw,” as in a debriefing.

¹⁴ “Transect walk” is a sampling term that refers to walking around a community with key participants to learn about geographic, environmental, or social features (Olayinka & Olutayo, 2012).

Exemplifying quantitative methodologists in South Africa, Bob Mattes at the University of Cape Town started the AfroBarometer, “an important data set” that fields “in twelve African countries.” Amanda said that Bob “happens to be her ex-husband” and that she has “the highest respect” for his work. He is “one of the best political scientists” in the country, and also one of the best trainers. Another methodologist is Johann Mouton at First University’s Centre for Research on Evaluation, Science and Technology. Johann was one of Amanda’s lecturers at the Rand Afrikaans University (now the University of Johannesburg).

Mixing and studying methods. When I asked what Amanda thinks of when she hears the term *mixed methods research*, she said it refers to a “combination of quantitative and qualitative.” She does not see a survey questionnaire with open-ended questions as mixed methods. Regarding mixing forms of data, or the extent and manner in which data needs to be mixed, Amanda brought up the frequently discussed “notion of triangulation.” Normally, triangulation involves using mixed methods to ensure that what a researcher finds, “for example, quantitatively, that [they] can back up with qualitative information.” A researcher may have “a survey, and focus groups, or open-ended interviews.” Triangulation compares results. In contrast, Angelique Wildschut’s (2011) study incorporated different data sets to serve different purposes, with open-ended interviews “explaining what was going on” in the quantitative data.

Amanda has never gone “out there” to study mixed methods. At the University of Illinois, her study of qualitative and quantitative approaches was split. After returning from the U.S., Amanda’s experience with everyday realities in South Africa’s very complex context led her to combine qualitative and quantitative approaches before

hearing about other researchers who had done so. When she later heard the term *mixed methods* among sociologists, she realized that what she was doing had a name. She has often combined quantitative approaches to test a broader hypothesis, and qualitative approaches to understand the context.

Amanda said that South African researchers view mixed methods as a “white western import” and hence are highly suspicious of the idea. The same is true for research approaches in general. For example, feminist theories encounter “a lot of contestation.” Hence engaging methodologies from the north must be done with care. Not everyone accepts that South African researchers “can just apply” outside methodologies. Amanda believed that “any method can be used as long as it is used contextually, and with sensitivity” toward participants. Methods themselves are “applicable to every context.” However, researchers must attend to the ways in which they develop and apply methods.

When I asked about the benefits or consequences of South African researchers using mixed methods, Amanda said, “there’s no other way... sometimes you really need to answer a broad question for which you need statistical data.” Amanda’s interest in “the government’s legitimacy” and levels of trust in government required a representative sample. Asking five people would have told her nothing. The prohibition is that of “enormous” costs, but with sufficient funding, statistical representation is important.

From Amanda’s disciplinary perspectives, South Africa researchers who engage mixed methods often do so to learn and generalize about a broader topic instead of engaging only a qualitative approach to study complexities. Amanda would like to consider how psychologists use mixed methods. Psychologists “do some qualitative

stuff” but Amanda says she does not read much psychological literature and is unfamiliar with reasons for using mixed methods in that field.

Exemplifying mixed methods studies in South Africa, the dissertation of Amanda’s former PhD student, Aneka Wildschut (2011), focused on “attrition of medical doctors.” The quantitative data set came from universities that track student entrances and exits. The 25 open-ended interviews among doctors who were women included some whom had remained in the field of medicine and some who had left. Amanda pointed out that part of the work of university supervisors is to “try to publish with your PhD students.” For two years, Aneka and Amanda had tried unsuccessfully¹⁵ to publish an article from Aneka’s dissertation, but the methodology was “very severely criticized.” The issues may have related to the question of whether entries and exits of “different year groups” can be compared, Amanda expressed.

Coding participant meanings. When I asked how Amanda captures participants’ meanings, she referred to consistent generalizations, which require coding. She also stated that she uses open-ended quotes from interviews “to illustrate theoretical points,” depending on the extent to which interview meanings “speak for themselves.” Consistency across interviews, however, requires coding. In the home-based care study, for example, the research team “really” needed to code even though the sample was “rather large” for a qualitative study. Making generalizations also requires coding with “rigorous, mutually-exclusive categories.”

Amanda believed that “computer software programs like Nvivo and a couple of others” help to account for detail-level coding. In the past, researchers had to code by

¹⁵ The qualitative phase of the study has since been published as Wildschut and Gouws (2013).

hand, a “more hair raising” and difficult process. Electronic programs allow “more rigorous, more mutually exclusive categories,” and ease the process of managing data.

Amanda “cannot think of any method” that can be considered indigenous to South Africa. Oral storytelling is an exception, but historians, feminists, or social anthropologists typically use the method more than do social scientists. Feminist theory uses journals “for students to record their own observations, their feelings, and their understandings.”

When teaching political behavior to second year students, Amanda explicated that she teaches them to conceptualize, operationalize, and create indicators. It takes time for students to understand these processes and their importance. Students’ topics typically relate to issues of violence. When analyzing such topics, Amanda asks how students *feel* about the topic. Students cannot answer that question! Relative to the thrust of the methods they use, they say “I *think* that” Researchers need to both understand cognitively what they are doing, and acknowledge the feeling component in order to put themselves “in somebody else's shoes.” For example, “you cannot go into the field and work with gender-based violence and feel nothing,” Amanda said. Amanda emphasizes feeling because “quantitative objectivity makes you believe that there is a separation between what you think and what you feel.” Even when creating indicators, “we cannot leave the feeling outside the door.” Feminist theory asserts that “the more you get involved in communities, the better the objectivity becomes.” Objectivity does not come from “standing outside looking in,” although even philosophers often dispute this. Amanda teaches her students not to leave their feelings “outside the door” when conducting research.

Extrapolating from my conversation with Amanda, the way methods tools (which can be used anywhere in any way) are put together to form methodologies differs across cultural contexts. Forming such larger methodologies is the difficult aspect of quantitative approaches. When asking participants whether they “*agree* [or] *strongly agree*, as in the old Likert scale,” participants’ responses do not help the researcher understand why the participants provide a particular answer. For their “experiments in democratic persuasion,” (Gibson & Gouws, 2003) made “little cards” to represent scales (response options). They gave the cards to participants to make the response categories less abstract, because “a lot of people are not numerate”.¹⁶ “When you see numbers it doesn’t mean anything!” People who live in urban areas “sometimes forget that people are not numerate” and assume that “everybody knows numbers.”

Likert scales are not a natural way of thinking for indigenous people, as Amanda said the results of Gibson and Gouws (2003) experiment showed. Contrary to Gibson and Gouws expectation, varying “variables inside a story did not make a huge difference,” Amanda said in the interview. Rather, the study’s overarching context during the “really violent time” between 1994 and 1996, “overpowered everything else.” Simply asking questions without considering the context does not explain results.

Needing ethical clearance and a *stupid* rating system. Amanda said that informed consent is necessary and that she does not have a problem with it. But, especially among students from American universities who conduct research, when “you have to read through an essay before you can get started, then it is just so torturous.” As a

¹⁶ Through member checking, Amanda confirmed that the cards were visual in nature but did not remember what was on them.

person with a PhD, Amanda said she understands the consent forms. However, for “uneducated” participants, understanding the forms is much more difficult. Amanda reiterated that researchers need to request consent, but that the implications of forms derived in the west is that South African universities are adopting the process. As a result, South African students and professors now “need ethical clearance for just about everything.” If a review committee serves a university with 17 thousand students, half of whom need ethical clearance, “it slows down the process tremendously just to go out on the street and ask people whether they smoke or not.” Referring to institutionalized research ethics, Amanda said she thinks requirements have “gone a little bit overboard.” However, institutionalized ethics requirements need to deal with people who have done studies that are quite unethical. Amanda’s statements reflect that she ponders how to balance those needs.

Amanda went on to say that consent forms “sometimes give a cop-out” for participants by saying, “you can terminate this interview *whenever* you feel uncomfortable.” After perhaps ten minutes, a participant may decide, “This is boring, I don't wanna do this and now I'm uncomfortable.” The researcher then ends up with “a hundred interviews,” each of which are only “halfway” complete. “That's a problem,” Amanda says. Saying to a participant that a study “won't hurt your feelings,” does not define what it means to have hurt feelings. There is no way to guarantee meaning, in that “something that hurts my feelings may not hurt yours.” The concept of “*hurt my feelings*” is very woolly.” Amanda reiterated that she is not against consent to participate, but that the forms are a problem. She does not think signatures are a problem.

Concerning South Africa's National Research Foundation (NRF),¹⁷ Amanda asserted that the "incredibly stupid rating system" makes her "very angry." She said that a colleague can "crank out eight articles because they sit in their office" and do research. In contrast, Amanda goes into the field after which handling open-ended data consistently across interviews is "incredibly time consuming." She said she can produce one or maybe two articles a year, which the "whole rating system does not take into consideration." The system was "designed for the natural sciences where they work on a microscopic little thing and know what they are doing." For natural scientists, "there's no going out in the field," as those who work with human subjects do. Amanda is "very critical of that." The NRF rating makes Amanda "so angry" when the foundation tells her that publishing "a lot" in both gender studies and in political behavior means she has no focus. The NRF does not grasp that a researcher "can work in two fields and use different research designs." To my proposition that the NRF rating does not take into account indigenous contexts, Amanda reiterated "no, not at all." Even though she has been chair of political science and philosophy, she said "I go on record saying it's a stupid system."

Summarizing Amanda's interview. Amanda Gouws focused on the disciplinary distinctions of her work in political science and gender studies as they relate to methodological approaches. She emphasized the role of theory in informing methodology. *Overcoming Intolerance* (Gibson & Gouws, 2003), a book Amanda co-authored, illustrated accommodating methods for populations for a study that needed quantitative sampling to represent South African people. Concerning capturing

¹⁷ South Africa's National Research Foundation rates and provides stipends to researchers in ways that encourage publication in journals that address western academic audiences (Visser, 2007).

participant meanings, Amanda asserted the need to code with rigorous categories for generalization. Amanda said that informed consent at First University has gone “a little bit overboard” by requiring “ethical clearance for just about everything.” Because South Africa’s National Research Foundation rates and remunerates professors without accounting for the time required to work with human subjects, it is a “stupid system,” Amanda declared. In all, research must be replicable and cannot be slap-dash.

Not Taking a Recipe and Ending up with a Cake! Yolandi Foster

“The choice to rely more on qualitative instead of quantitative is based on a level of literacy, language difficulties and the nature of African people who want to talk and tell their stories.”

“Western researchers believe they can take a recipe and end up with a cake. In South Africa there’s too many nuances and too many ways of doing things and too many influences, too many contexts. It's not one-size fits all, like it is in a laboratory.”

Preparing to interview Yolandi. Yolandi Foster (pseudonym) completed a bachelor of education in consumer sciences (1992), a further diploma in education (1994), bachelor of education (honours) degrees in remedial education (1995) and educational psychology (1998), master of science degrees in sociopedagogics (2001) and educational psychology (2001), and a PhD in educational psychology (2006) at the University of Pretoria in South Africa. At the time I interviewed Yolandi in July of 2013, she was Head of the Department of Educational Psychology and Associate Professor in the Faculty of Education at South Africa’s University of Palesa (pseudonym), where she has taught since 2001.

I learned of Yolandi Foster in the U.S. summer of 2012 when she came to Lincoln, Nebraska to further her understanding of mixed methods research by visiting my advisor, John Creswell. Although I did not get to meet Yolandi that summer, we struck up an e-mail conversation. At first, I considered only mixed methods first authors and supervisors, and did not include Yolandi on my list of possible contacts. When my advisor later recommended interviewing Yolandi, I was delighted and expanded my boundary of possible participants to include any author or supervisor of a mixed methods study.

Arriving at the parking lot of the building at the University of Palesa where I was to meet Yolandi, I saw an educational psychology professor whom I had met a few weeks prior. The professor and I conversed in Afrikaans while she walked me to the faculty lounge where Yolandi had brought an array of bakery goods to celebrate her birthday. For about twenty minutes, I enjoyed the conversation of the faculty members before walking across the hall to Yolandi's office where we pulled up chairs around a small conference table covered with a tablecloth.

Researching cultural complexity. As a backdrop for my interactions with Yolandi concerning mixed methods, I begin by describing her response to the question of how to handle South Africa's linguistic breadth. Yolandi said it is a *big* challenge. In a project on HIV-infected mothers, the research team had instruments translated and back translated. The task was "just chaos because we had several African groups, and we had the questionnaire translated" into several languages. The reality that certain phrases "don't exist" in certain languages contributed to the pandemonium. Back translating looks for "inappropriate target" wording and "doesn't make sense." Yolandi related that she

does not know how to handle South Africa's dilemma of lacking "a common language by which to completely express things in ways that everyone understands." People return to their mother tongue to "really express" themselves and what they feel; hence, participants want to use their mother tongues. This problematizes studies that explore "more than knowledge," or that attempt to access feelings and experiences. Using translators increases the burden. Ideally, team-based approaches may be possible in settings where participants take ownership of projects, although such approaches present financial challenges.

To modify South African research for cultural complexity, Yolandi positioned action research as having "a lot of value." The way "we do" participatory action research and "connect with the communities allows the communities to also have a voice, and to determine the process," she said. Action research contributes to community psychology in particular. In Yolandi's case, teacher participants feel that they are heard. Yolandi's indicated that her team asks themselves whether participants should co-author and very much tries to understand and explore "where the power lies" in that relationship. Theoretically, Yolandi opined, the power is equal "but it isn't." In all, Yolandi thought that "conducting action research in under resourced communities," definitely makes a contribution. Negotiating through discussion from the inception of a project resulted in "a lot of actions, a lot of workshops, and a lot of fun activities" to collect data. Through Yolandi's studies involving mostly women or HIV-infected mothers, she has found "African women wanting to help and wanting to serve and wanting to talk and wanting to have relationships." The nature of African women has "determined the way" Yolandi's team approaches the studies they do.

Slanting toward methodological strategies. Yolandi specifically described her research and mixed methods background by saying that she focuses on in participatory action research for which she “mainly uses qualitative methodology.” When a research question “asks for questionnaires to be implemented,” she does mixed methods. In an article about community-based research for expectant fathers,¹⁸ it “made sense to answer the research question by first having the questionnaires” and then get more in-depth information. She related that she has “never done pure quantitative studies.”

Relative to defining terms, Yolandi articulates that quantitative strategies always involve statistics with “cause and effect, testing or confirming, or rejecting or disconfirming.” When using quantitative strategies, researchers look for a relationship (between variables, I assume). Qualitative strategies “get a deep understanding, and get at the idea of the perception, the experiences, or the personal meanings” that participants “attach to something,” Yolandi explained. She positioned that among South African researchers, the fields of education and psychology “definitely slant toward qualitative.” Educational psychology in particular is more qualitative at her institution. In the “main discipline of psychology,” she thought there may be a balance between qualitative and quantitative. Yolandi estimated the portion among education is “60% qualitative and 40% quantitative” at her institution.

Yolandi articulated that, according to her understanding, mixed methods “combines qualitative and quantitative strategies such that they support and enrich one another” and the results. A study’s research question and focus determine whether a researcher involves the strategies simultaneously, or whether the researcher involves one

¹⁸ Because Yolandi’s name is a pseudonym, I do not cite the article to protect her anonymity.

strategy “first and then the other second.” Researchers also need to consider the question of whether they need a questionnaire, whether they only need qualitative data, or both. Mixed methods combines the two strategies “in whatever degree.” It may involve a questionnaire “and at length qualitative methods,” or the other way around.

Yolandi heard about mixed methods by “reading John’s book!”¹⁹ Her research question for her master’s degree involved “questionnaires with lots of parents,” of whom she selected a few to interview. When reading in preparation for that study, she came across the term *mixed methods*. The term seemed familiar, as if she had just found “a terminology” rather than a new idea. Mixed methods impressed Yolandi as “an emerging methodology that made a lot of sense” and that was “taking the field.” She thought it obvious that research “needs to be like mixed methods.” In all, it was the nature of Yolandi’s master’s research that took her to a point of realizing she needed to do mixed methods.

Influencing and resulting from mixed methods. Yolandi saw mostly advantages and does not see disadvantages of using mixed methods. From her perspective, the benefit of South African researchers using mixed methods is that it provides “many angles and different nuances” for studying a phenomenon without a one-sided view. Involving mixed methods enables several perspectives from which to consider several issues or from which to build a phenomenon. Mixed methods “definitely gives a more complete picture.” Particularly when crossing cultures (as in the South African experience), using “purely questionnaires” presents “unfamiliar ground,” and is really challenging for participants, Yolandi asserted. Only “going the quantitative route”

¹⁹ Yolandi was referring to John Creswell.

does not necessarily give “a true view.” Only “going qualitatively” leaves “the gap of not having the numbers” and not being able to “state percentages.” By mixing methods, a quantitative approach adds “a more concrete view of what’s happening” while a qualitative approach adds depth.

When I asked Yolandi what aspects of Western cultures influences mixed methods, she answered that being a “developed audience,” people can get results because “X logically leads to Y” and will lead to Z. In the west, people believe that they “can take a recipe and end up with the cake,” Yolandi portrayed. She confirmed my comment that everything is structured and can be structured. In that context, researchers can “take a questionnaire and implement it and get results” because everything (systemically, I extend) works. Research audiences of the developed world are knowledgeable. Conversely, Yolandi portrayed that in South Africa “everything is not working.” There are so many different cultures and no one culture allows a person to say, “this is a South African way.” There are “too many nuances and too many ways of doing things and too many influences and too many contexts” that need to be taken into account in deciding what to do. Unlike a laboratory, the situation is “not one-size-fits-all.” South African researchers cannot simply implement questionnaires and must incorporate other approaches and methods for “a more balanced view.”

A project in which Yolandi has been involved since 2003 exemplifies the challenges in implementing questionnaires. The project initially started qualitatively and then progressed to implementing questionnaires “with black communities with black teachers.” Yolandi voiced that the experience of implementing standardized and pre-existing questionnaires (the Resilience Scale 14; the Orientation to Life questionnaire;

and the Oxford Happiness Questionnaire, short form) was very challenging. The teachers struggled to understand and asked “a lot” of questions. The research team “changed the whole method of implementation” so participant teachers would understand what the researchers asked. The interviewers explained the questions “in other words” after reading them. Participants tended to mark “a 1 or a 7 with nothing in between.” The language was unfamiliar to them and Yolandi explained, “they are not used to doing questionnaires.” Yolandi’s team does not know what to do with the results given that the team implemented the questionnaire differently than the standard intent for which it was developed. It was “*really* a struggle,” Yolandi emphasized.

When I asked how closely South African mixed methods researchers stick to research questions relative to researchers in the U.S. or the global north, Yolandi said that researchers in South Africa definitely have to be more flexible and fluid. The research process and its design are “more fluid and dynamic,” Yolandi voiced. Researchers “come across something” they think they must incorporate, and then “stumble across something else” they also feel a need to incorporate. While “sticking to what you intend to find out,” researchers must remain “open to also finding out several other things.” Yolandi tells her doctoral students that, “chapter 1 is not done until right at the end, and right after chapter 5 we will revisit chapter 1.” At the end of a student’s study, Yolandi revisits where their study took them. Due to the richness of participants and data, researchers “may lose out” if they stick to only one thing, ignoring something else that “pops up” because it was not in the initial plan.

In terms of both where northern mixed methods fails and where South African culture influences the use of mixed methods, Yolandi identifies language. “Using

questionnaires with African groups poses the challenges of participants not understanding the language” and of them being unfamiliar with questionnaires. Participants find it extremely exhausting to respond to questionnaires. Even for a brief questionnaire Yolandi’s team “likes to take a break of ten minutes” after only two or three pages. Administering a questionnaire is “almost a daunting task,” Yolandi described. Challenges completing questionnaires may relate to the nature of South African education, and to lack of “previous experience with books,” Yolandi says. The teachers Yolandi works with “were taught twenty years ago” at a time when they did not encounter or complete questionnaires. I commented that even South African exams do not involve questionnaire-type instruments. “It’s just unfamiliar ground” for participants to sit down and complete a questionnaire, Yolandi reiterated. Such challenges are the case whether a study is purely quantitative or mixed methods.

As a result of South African cultural influences, mixed methods studies lean toward qualitative and participatory approaches, Yolandi portrayed. The choice to “rely more on qualitative instead of quantitative is based on a level of literacy, language difficulties and the nature of African people who want to talk and tell their stories.” That phenomenon may relate to “oppression, and the idea of not being heard,” Yolandi speculated. If researchers ask participants to tell their stories, it allows the participants “to overcome that political barrier.” Mixed methods research in South Africa could further reflect South African cultures by “going into a direction where we jointly develop instruments” with participants, Yolandi suggested. She recommended that mixed methods assist in implementing “culturally friendly ways of exploring issues.”

Verifying participant meanings. To verify participant meanings, Yolandi's described her research team as maintaining very open relationships with their participants. Consistent with African culture, if participants "relax in your presence, they are willing to share their views," Yolandi portrayed. Such open sharing is "found in that *really* close relationship of trust" by which participants "know they can speak out in our presence." Following an emancipatory approach, Yolandi's teams "approach their participants from the start by saying that the participants are the experts." The research teams enter the field saying, "You're the experts, you've got the answers. We here²⁰ to learn." The researchers "set the stage" by helping participants "feel that they've got the power" to speak out.

In the context of such open relationships, Yolandi said that her research teams "constantly do member checking" and "continuously do monitoring and evaluating visits" to verify how closely participant meanings align with the meanings researchers think they have captured. During those visits, researchers tell participants what they have heard and ask whether that is consistent with what participants intended. Participants will "easily tell you *No, this is not right. I don't agree, or Yes but.*" Hence, the research teams "don't find problems with member checking," and Yolandi said that member checking is suitable in African settings. When Yolandi's team publishes, they use participants' words to write up and disseminate evidence of research discussions, and sometimes give proposed manuscripts to participants to confirm.

Trusting relationship for ethical research. According to Yolandi, the approach to, and the idea behind western informed consent processes is suitable for South African

²⁰ South African vernacular omits *are* after pronouns.

purposes. However, the way in which researchers present and implement informed consent “should be adapted according to the context,” she clarified. For example, in South Africa, “the relationship of trust is even more important than starting out and knowing you need to get informed consent.” Yolandi tells students that, even if it takes 2 or 3 visits to get participants “to open up to you,” then take the visits. Informed consent “should not be the ultimate first step,” Yolandi asserted. Because ethical research implies that participants “need to immediately know what they are busy with, what they are giving, and what they can expect,” researchers should gain consent before collecting data. But knowing and understanding these components of a study may only happen after a couple of “informal encounters to establish trust and relate.” During these preliminary encounters Yolandi’s teams ask where participants are from, how many children they have, where they live, and about their life stories. This information need not relate to the research question. Yolandi distinguishes this information as separate from formal demographics that are collected after the start of the formal study. Informed consent in South Africa should involve “more time explaining what you mean, and making it very practical.”

Yolandi was trained to “tell participants about confidentiality and anonymity” in interactions with research participants. An eastern Cape project, however, exemplifies a situation where applying anonymity may be less appropriate. On an occasion, when showing participants a prepared manuscript, the research team “could sense that” participants were not listening, Yolandi described. When the researchers asked what was wrong, the participants asked, “Why did you blur our faces?” The participants “were cross” with the researchers who then asked, “What do you want?” The participants said,

“I want my name to be there and I want my face to be shown!” The western world has “decided that participants should be anonymous,” and that researchers should not know participants’ names and faces, Yolandi asserted. But it seems that some “African people *want* to be known.” Yolandi’s team had since changed informed consent forms to also ask whether they may show participants’ faces on photographs, and whether they may mention participants’ names. In response to these revised consent questions, all new participants have thus far said, “Please show my face and mention my name,” Yolandi confirmed. I believe this statement speaks for itself in showing the need for participant-centered ethical considerations.

Summarizing Yolandi’s interview. Yolandi repeatedly asserted the need for the research question to inform general methodology and specific design. Advantageously, mixed methods research may provide more a more complete and nuanced picture. Challenges to implementing mixed methods in South Africa relate to language, literacy level, and a desire to tell stories. Responding to the unfamiliarity of questionnaires and agreement scales is extremely exhausting, and may relate to lack of experience with books and the nature of education in years gone by among some people. Another type of challenge is that the South African context is not conducive the logic of a one-size-fits all recipe. Due to these challenges, mixed methods leans toward qualitative and participatory approaches. Yolandi believes that action research is a valuable way for mixed methods and other methodologies to address cultural complexity. Speculatively, allowing participants to tell their stories may allow them to overcoming the political barrier of not being heard under oppression. Getting to know participants and developing open relationships before and after gaining consent allows them to relax, trust, and speak.

Because participants may *want* to be known, researchers may ask rather than tell them that their anonymity will be maintained. Researchers also need to view participants as experts.

The Colonizing Perspective Has Gone Away! Xoliswa Mtose

“The more you drink from knowledge, the more you become humble. The less you know, the more you become arrogant.”

“The idea of being very naive in terms of assuming that you're ‘from the United States therefore the world revolves around you’ is gone!”

“These colonizing perspective, for some time now, has gone away.”

Preparing to interview Xoliswa. Xoliswa Mtose completed a bachelor of arts degree at the University of Fort Hare, a higher diploma in education (primary) at the University of Cape Town, and an honours program in African languages from Rhodes University in 1998. She went on to complete a master of philosophy in higher education at the University of Stellenbosch in 2001 and a PhD in psychology from the University of KwaZulu-Natal in 2008. She also received a South African scholarship to study at Harvard University (2002-2003), and serves as executive member of South Africa’s Anti-racism Network in Higher Education.

Beyond her education, Xoliswa has served as lecturer and coordinator of distance and continuing education at South Africa’s Rhodes University. She subsequently served as senior lecturer, deputy director, and director of the schools of postgraduate studies at the University of Fort Hare. She later served as director of the School for Initial Teacher Education and as dean of the Faculty of Education at the University of Fort Hare. At the time I interviewed Xoliswa in August of 2013, she was dean of the Faculty of Education

at South Africa's University of Bangizwe (pseudonym). She has since become Deputy Vice-Chancellor at the same university.

I became acquainted with Xoliswa Mtose's work around 2012 through Durrheim, Mtose, and Brown's (2011) book *Race troubles: Race, identity and inequality in post-apartheid South Africa*. When I searched Google Scholar for publications that included the term "mixed methods" and "South Africa," I found Mtose and Moyo's (2012) article titled *Psychosocial support offered to learners: A case of Gwanda district*. The article describes the study as a "mixed-model" (p. 333 citing Johnson, 2008) version of mixed methods research, incorporating open-ended and closed-ended data collected via the same instrument. I also wanted to interview Xoliswa in hopes of speaking *kancani* isiZulu (a little isiZulu) with her.

In June of 2013, I sent an interview invitation to Xoliswa at the e-mail address I had found on Mtose and Moyo (2012). After receiving an automated reply saying that Xoliswa was no longer at the university where I originally contacted her, I called her former department and asked whether they could tell me how to contact her. Fortunately, they gave me her e-mail address at her new institution. Xoliswa responded saying that she "claims no fame in being an expert" in mixed methods, and that she sees herself as a social psychologist. In response, I said that I am looking for practitioners who use mixed methods rather than professional research methodologists; I also attached the interview protocol.

A few days before the interview, Xoliswa's assistant contacted me by e-mail to ask whether I was still coming, how long the interview would take, and whether I would come alone. I assured Xoliswa's assistant that I was still coming, that I would keep the

interview to an hour, and that I would come alone. The day before the interview, I drove by the Faculty of Education on the University of Bangizwe's rural campus, intending to gain a sense of where Xoliswa's office was located.

On the day of the interview, I arrived on campus without the name of the building. I had asked for the name of the building, but as in many parts of the world, addresses and building names may not be identified. After a few minutes, and most certainly with a look of puzzlement on my face as I attempted to find Xoliswa's office, I saw a man whose kindness left me thinking of him as a true gentleman. The gentleman asked a couple of young-looking students to walk me to Xoliswa's office. Shyly, they walk me most of the way but didn't exactly know where her office was located.

Fortunately, I found Xoliswa's administrative assistant who knocked on Xoliswa's door and introduced me. By that time, I was five minutes late. Xoliswa said, "I thought you weren't coming." I apologized and assured Xoliswa that I had fully intended to arrive.

We happily chitchatted and laughed together in a combination of isiZulu and English.²¹

Xoliswa invited me to sit down on a wooden chair at a large round table in her office. She told me that the protocol had made her even more nervous because she did not know the answers to the questions, but that she was beginning to relax. I reassured her that I wanted to know whatever she thought without any right or wrong answers.

²¹ My experience has been that attempting to converse in languages other than my own often sets up endearing relationships. Unlike Afrikaans, which most people who grew up in apartheid South African learned, isiZulu is not a language that white South Africans—let alone Americans—learned during the 1970s and 1980s. Thus, attempting to speak isiZulu pleasantly surprises people.

Using terms. For the formal part of my interview with Xoliswa, I started by asking what she thinks when she hears the term *mixed methods research*, to which she replied that it brings thoughts of “using qualitative and quantitative together.” She clarified, however, that the term does not indicate whether data is mixed during analysis or through “the philosophical framework.” Bringing the two forms of data together requires resisting the tendency to mix a theoretical framework early on before mixing data in the presentation of results.

Xoliswa defined the word *quantitative* as making researchers want “to quantify, to validate, or to check reliability,” and elicits thoughts of numbers and value. It brings to mind something that a person “can check and balance.” The word *qualitative* evokes spoken words and experiences from which researchers can make meaning. Consistent with her studies in the field of education, Xoliswa leans “much more towards qualitative.” She takes a social constructionist viewpoint and “wants to hear people's stories.”

Xoliswa criticized technological assistance for statistical analysis because learning quantitative approaches without such assistance helped her “understand the originality” of the answers she got. “Loading numbers in the machine” did not ensure that she knew the formula. A form of outsourcing, Xoliswa cautioned that technology requires researcher training and understanding in how to use the system. Researchers are lost if they don’t understand formulae.

Simple writing and simple training. Xoliswa mentioned that she encountered mixed methods in classes before going to Harvard, but avoided the approach due to her lack of understanding. She emphasized that her Harvard training provided more

awareness of mixing qualitative and quantitative methods through a mixed methods book by “Creswell.”²² She “just *loved* his book” because it puts the approach in simpler terms than “the very deep way” in which she had previously been taught. “Creswell’s” writing is really good for those who are in the process of learning mixed methods, Xoliswa promoted.

“The more you drink from knowledge, the more you become humble; the less you know, the more you become arrogant,” Xoliswa described. Exemplifying academic arrogance, “a lecturer in Stellenbosch” wrote as if methodology is a “gift from God” that students would never understand. Prior to studying at Harvard, Xoliswa expected professors at that institution to be arrogant “gurus” and that she would “be really lost.” She was surprised to find them “so humble and simple” to follow. The issue, Xoliswa explained, is how much a person knows and the extent to which they “use knowledge to empower or disempower other people.” When givers use language to empower, they empower themselves and the receiver. Giving power opposes the stance of the “arrogant lecturer” who used their position to disadvantage students and whose book presented material “so stupidly” that readers felt they would never understand. Xoliswa wondered why do people write or teach in ways that confuse those “who don’t know the field,” rather than empowering others with a simple voice.

The simple way in which “the Creswells” write makes the mixed methods voice much clearer than the ways South African people write, Xoliswa proclaimed. Xoliswa did not expect a clear voice to come from a perspective outside South Africa. The way a person uses the language (i.e. English) is becoming more important than their location.

²² Based on her time at Harvard (2002-2003), Xoliswa may be referring to Creswell (2003).

The complexity of South African academic writers and their desire “to be seen in a different light” leads them to “push so hard,” Xoliswa explained.

Xoliswa’s motivation to use mixed methods came when she analyzed data from her PhD thesis. Relative to her qualitative preference, Xoliswa was surprised to find herself “stuck needing a numeric thing.” The need to mix qualitative and quantitative approaches arose accidentally based on the need of the study rather than on a prior framework. Although Xoliswa knew about mixed methods, she did not mix quantitative and qualitative approaches until she encountered a need to do so. Quantifying allowed her to complete the analysis when her study had “so much going on.” In terms of her students, their paradigms have at times caused her to advise “grappling” with mixed methods from the beginning, as with N. Moyo (2010) and Murugan (2011). At other times, mixed methods “just happens.”

Lack of confidence among mixed methods post-graduate supervisors about how to use mixed methods constrains its use in South Africa. There is a “very big lack of training” in research methods. Thesis supervisors often promote whatever methods they used for their own doctoral studies, and do not want to “read with their students.” Engaging “rusty knowledge” from her training, her experience of talking about research methods in general, and her experience of writing about her perspective on methodology help Xoliswa. “There is no way” all the students she supervises can follow the approach under which she was supervised. She exposes herself to students by helping them understand that she is “in this journey” with them, and that they will learn together. The excessive fear of South African supervisors that keeps them from “walking together” with their students as learners is dangerous. Through her knowledge of a methodology’s

principles, and by reading with her students, Xoliswa learns and enjoys reading their work even more. Students then bring fresh work for her to read and critique. Xoliswa wonders whether people in the United States are like that. I speculate that they follow their own traditions. Xoliswa agrees. She tries “by all means” not to say that students must conduct a phenomenological study.²³ She applies her understanding of a research paradigm, and of ways in which researchers can formulate and frame their thinking. She is “liberated enough to allow students to bring a fresh angle” to the guidance she gives. Lack of training and understanding in South Africa prevents supervisors from realizing that there are ways of doing research other than the tradition in which they were trained.

In terms of her own training, Xoliswa was lucky to “fall into the hands of” Kevin Durrheim, who supervised her PhD thesis. Kevin was interested in her area and is a methodologist “through and through.” He wrote simply and trained his students in ways that “go far” for Xoliswa as a person.

Difficulties in using mixed methods. The disadvantage of mixed methods is misuse due to lack of understanding, Xoliswa said. Researchers “drop mixed methods” like they drop names, without following an integrated approach to the analysis. They present and analyze data without showing how they have mixed methods to benefit empirical work. Problems include lack of grounding in mixed methods, and “disintegrating” the discussion of quantitative and qualitative. The biggest problem is seeing quantitative and qualitative approaches as separate but calling them *mixed*. This leads to a very weak discussion in opposition to the label of mixing.

²³ Xoliswa’s doctoral thesis took a phenomenological approach concerning black identity in South Africa (Mtose, 2008).

A further challenge of using mixed methods, Xoliswa posed, is the need to talk more deeply about issues of credibility and reliability. Researchers tend to lean on one of those. Using mixed methods “from the very beginning” of theoretically framing a study’s method demands distinguishing between *credibility* and *trustworthiness* for quantitative aspects. Xoliswa then mentioned Lincoln’s five aspects²⁴ of the rigor of methods.

For Xoliswa, the difficulty of mixed methods is mastering both quantitative and qualitative approaches. However, if a researcher masters both approaches, how they work together and “can complement one another,” mixed methods becomes advantageous and gives a much richer and more “rigorous way of understanding and unpacking studies.” Framing a research discussion around both methods together can strengthen the data, Xoliswa stated. Mixed methods studies “enrich the way in which you see things” when the two “complement each other.”

In response to my question of whether having a few research methodologists in South Africa would help, Xoliswa confirmed that they could help “big time.” Research methods “that are fraud” are not rare and impinge on how participants respond to questions. I take Xoliswa’s reference to “fraud” as meaning that the lack of training and specialists in research methodology may result in problems with the validity of findings. Having units, or universities that specialize in research methodology would “really strengthen the kind of research” produced in South Africa.

²⁴ I suspect Xoliswa’s reference to Lincoln’s *five* aspects of rigor along with *credibility* and *dependability* may pertain to Lincoln and Guba’s (1985) discussion of *credibility*, *transferability*, *dependability*, and *confirmability* as ways of operationalizing *trustworthiness*.

Not subscribing to cultural influences. When I asked how South African and western cultures have influenced the use of mixed methods in South Africa, Xoliswa replied that she did not know. Her experiences of coming “from both worlds” make the question difficult to answer. She does not “subscribe” particular ways to the west or to South African culture. In spite of her hesitance to ascribe practices to the north or south, Xoliswa went on to relate preference for methodological approaches to academic formation of researchers in the United States and South Africa. In the United States, Xoliswa found that students talk about and gain much exposure to *doing* methods in quantitative and qualitative worlds. In contrast, even lecturers in South Africa lack confidence in talking about “the quantitative side of things.” Xoliswa explained that if South African researchers-in-formation had access to quantitative experts, it would remove the anxiety of “dealing with numbers” for non-numbers people, but this access is not normally available and students do not learn the quantitative side of work at an early stage. Researchers “shy away from using quantitative” and frame statistics as something to refer to more than as something to do. As a result, mixed methods “becomes a stranger in doing research.” Xoliswa recommended training researchers in both qualitative and quantitative approaches to counter this reality.

I then asked Xoliswa whether South African researchers have modified the way she learned mixed methods at Harvard, to more fully capture diversity, to which she again explained that constructing the ways other people do things is not possible for

her.²⁵ At the South African university where Xoliswa studied, her supervisor was a methodologist who was very careful about “rushing into the field,” she said. The problem is that investigators tend to think they can ask rather than “unpacking” research questions for respondents. Researchers need to spend more time “looking at what they intend to do” in the field.

Related to Xoliswa’s recommendation for adjusting data collection instruments or consent forms, she mentioned a project among adolescents, saying that sometimes “terminology differs big time” and constrains the ways people respond to questions. For example, Americans call a South African *serviette* a *napkin* and *toilettes*, *restrooms*! In reality, Xoliswa explained that “silly things” in language, and in how people say things in the United States and South Africa, are important.

When I asked further about adapting questions and rating scales, Xoliswa said “I really don’t have answers for the sake of your research.” I realized I had pushed too hard. Xoliswa went on to say that she thought the reason she did not have answers about cultural influences is because the researchers with whom she has worked were very clear and had experience “working outside the United States.” Xoliswa said she doesn’t want “to formulate stories” to which she did not have answers, for the sake of my research. The people with whom she had worked have “had a very clear agenda.” Xoliswa posed that perhaps by the time she worked with them, they had gained enough experience to avoid saying, “this is the world and this is how people will understand.” Reasserting this

²⁵ At this point, I began to sense that my questions about influences of the global north and South Africa were not possible to answer but did not stop myself from asking the questions I had predetermined. Ideally, I would have changed the direction of the questions in response to Xoliswa’s comments.

in my own words, Xoliswa was saying that the researchers she had worked with outside the United States had not tried to impose their own assumptions of the world on South African researchers or participants.

Regarding my question of whether researchers in South Africa are more sensitive to their participants than those in the United States, Xoliswa countered that this is not necessarily true. Again, she feared “putting people in boxes and generalizing about them.” A U.S. researcher may be very sensitive and sensible. In general, “researchers are hasty, hasty people because they want the answers” and they want to write as soon as possible, Xoliswa advanced. Insensitivity may appear “here or there,” depending on a particular researcher’s training and “demeanor as a person.”

In contrast to the advice of research textbooks that say researchers must be sensitive and humble, Xoliswa cautioned that “being overly sensitive” in the field can “be a constraint.” For example, “coming from outside [South Africa], and trying so hard not to hurt people and not to be seen as arrogant” results in researchers pushing themselves in another direction. At another extreme, attempts to avoid being seen as arrogantly saying, “I want what I want; I’ll take what I want no matter what; I don’t care about these people; and I don’t care about their feelings” is clearly inappropriate. Researchers are “just vulnerable beings,” vulnerable to their own approaches and to the ways participants view them as researchers.

Reflecting on her work with U.S. studies since 1999, Xoliswa noted that U.S. researchers are now “more sensitive and conscious” about how they construct people. Researchers are aware that they must be careful. Xoliswa conveyed that she had seen extremely professional and sensitive U.S. researchers making strides to avoid

undermining the cultures of other people. Xoliswa had recently finished a paper with the University of Pennsylvania on health issues. Researchers problematically immerse themselves in studies on which they work, Xoliswa portrayed. When U.S. researchers ask for “an outside eye to really assist in constructing” more sensitive materials, they show that the colonizing perspective has been gone “for some time.” Researchers from the United States are aware of doing things that “push too far.” Such awareness indicates willingness to ask for an “inside” South African voice before going into the field. Xoliswa proclaims that the naïve idea of people from the United States that “the world revolves around” them is gone!

Returning to the “issue of colonization, particularly by the west,” Xoliswa illustrated that due to today’s technology, people in South Africa deal with the west every day. The world is “so close” relative to “old times” when there was a “big time” sense of “*us* and *the other*.” Differences are not literally gone, but technological interactions move the question to one “of understanding and coming closer.” To a large extent, South African academics “get so used to” this closeness that they imagine the gap between west, east, and south no longer exists. Much of the time, the gap seems imaginary. Xoliswa pointed out that even she and I feel that we “come from both worlds” in that we have parts of *this* and parts of *that* world. That “hybrid space” results in a psychological reality that we are “neither here nor there.” We transcend! Talking about colonization today is difficult. Twenty years ago, “the really strange” nature of the world made differences “so obvious.” Now, Xoliswa professed that she finds attempts to discuss differences constraining.

I thanked Xoliswa for “pushing back on me.” I acknowledged that although I am “looking at the influence of culture on research methods,” conducting interviews has led me to sense that the “series of questions about South African and western influence have been less appropriate to ask,” than they seemed when I worked with my committee. I extended that Xoliswa’s “pushing back” allowed me to say that “disentangling separate sources” is less relevant than in the past.

Responding to interviews. Xoliswa moved to a metalinguistic level by cautioning that U.S. researchers should avoid interpreting pauses and body languages as meaning that a person is hesitant. Rather, researchers should listen to what the participant as data source says, given that the person may be “thinking in another language or trying to answer” a question. Even when conducting studies in their own languages, cultural differences could cause researchers to misread such cues.

Xoliswa questioned the extent to which researchers should probe participants. Researchers should not probe to an extent that a participant “loses self-confidence” or loses their sense of self. Questioning beyond a participant’s depth may upset them and increase their sense of disempowerment. Given participants’ desires to ensure that they have pleased a researcher, probing too much may lead them to wonder why they are “being asked so many questions,” Xoliswa explained. Participants may interpret probes as indicating that they are not providing the right answer. Cultural difference and distance heightens participants’ keenness to give such “right answers.”

Xoliswa likened classroom students to research participants. She shared from her perspective as a teacher how differences between U.S. and South African student responses influence the appropriateness of interviewer probing. U.S. students need not

show that they understand. But South African students verbalize or use body language to indicate questions and “*aha* moments.” U.S. students say, “We are knowledge; we know this,” thinking that the teacher is adding nothing. In contrast, South African students are conscious of the extent to which they are “hitting the ball” and avoid assuming that their understanding coincides with that of a teacher’s. South African students and participants consciously clarify what they have heard, a reality that influences the appropriate kind and amount of probing. South African students and participants are “less arrogant,” and less assuming that they have responded appropriately. They are more hesitant, more self-questioning, and more eager to ensure that they are “giving you the right thing.” Xoliswa intentionally addressed probing when talking to researchers “from outside” to emphasize that probing should be “measured by the comfort or discomfort of participants.”

I explained that the reason for my probes was to ensure I would “see things from all angles” and take away interpretations consistent with what Xoliswa said. I asserted that I was “like a South African person who's always questioning,” and asked how my probes have felt to Xoliswa. She was “very much comfortable” because I was “not putting words” in her mouth. She laughed and said she was “just talking and thinking out of the box, and talking her nonsense.”

Reinforcing ethics and thinking carefully. Xoliswa pointed out that “reinforcing ethics” across all institutions has made researchers think more carefully. Ethics committee reviews of questions to be asked in the field may improve approaches to research and data collection. I asked whether those working in ethics divisions are researchers with post-graduate degrees that would help them understand research. Xoliswa says yes. “Research ethics is under a deputy vice chancellor or a dean of

research” responsible for all of the university’s faculties, Xoliswa explained. Each faculty member must have “a clearance certificate” before they or their students go to the field. Committees comprised of faculty and university management (deans and researchers from other units) scrutinize proposals. People “not necessarily in your field” would review materials. Each dean should know the story of each proposal because information gets “messed up and muddled up.” Social scientists and scientists often come from different worlds, Xoliswa articulated. She remembered laughing at a colleague from a science field. When they reviewed a student’s proposed model, the science faculty member asked, “What do you do with that model? Does it stay in the dissertation on the shelf? Where will you test it?” As has happened in the past, Xoliswa said that if there had been no opportunity for them to talk as colleagues, someone would have made “a wrong judgment.” In Xoliswa’s days, each proposal “was divorced from” faculty professors and reviewed by an ethics committee far from the student’s own faculty. That process dogmatically exposed proposals to people who may not have understood “the game in the field.” Ethical decision-making processes have improved greatly.

I asked about the extent to which Xoliswa felt that U.S. consent forms are appropriate for South Africa participants. She explained that in when she has worked as a consultant on U.S. studies, she has “looked at cultural differences” in putting together ethics and consent forms. She has been sensitive to aspects of forms and procedures that would otherwise have involved researcher insensitivity. She expressed that she has been “used as an outside eye” by people (e.g. at the University of Pennsylvania) who say “please come and really assist us in constructing this so that we are more sensitive.” Xoliswa thinks that “for some time now,” among “people from outside,” the “colonizing

perspective ... has gone away.” She also thinks that “people from the United States ... are aware that [they] might be pushing too far.”

Worrying about our interview. When I pointed out Xoliswa’s reflexivity, she confirmed that she was very much trying to reflect. She described the interview as “good” in that I knew my instrument but was “not going by” it and was able to “think backward and forward.” We laughed as she speculated that I would struggle to analyze the data. The strength of the highly semistructured interview (referring to the looseness of the interview’s structuring) would tell her story, she proposed. The nature of the interview discourse led her to go “this way and that” and to pull me in all kinds of directions. She mused that that was what we wanted to see.

Xoliswa indicated she had been much more worried about the interview than I had been.²⁶ She is skeptical and critical about participants not knowing research problems, research questions, or the answers researchers seek. Xoliswa explained that she had approached her interviewee role in our interview with an interviewer’s perspective. She is irritated when an “interviewee wastes [her] time” and gives her nothing by assuming to know what she is looking for and by trying too hard to give “correct” answers. She “hates” when interviewees say things just to please interviewers. Rather than seeing people pretend, Xoliswa “likes people to be themselves and say the truth about what they think” and feel regardless of “whether it is right” for the interviewer. Xoliswa had worried that she would try too hard to give me correct answers. She said she was glad she had been herself, as “beliberated and stupid” as she wanted, and that she had

²⁶ Xoliswa used the word *worried* five times, all within the turn in which she described her anticipation of our interview.

said the things she wanted to say. She hoped that “whatever nonsense” she had said would benefit me. She hoped that she had “given that part of [herself] today.”

I apologized that Xoliswa felt nervous about talking with me. She says she “was nervous about failing” me, and what I hoped to achieve. I explain that I carefully chose those I invited to participate, that I was not conducting many interviews, and that I did not haphazardly read her 2012 paper with Moyo that told me she had “read and done something with mixed methods.” I asked whether Xoliswa would like to say anything else. She thanked me very much “for coming all the way” to her university²⁷ and hoped I had gained what I was looking for.

In response to her discussion of empowerment, I softly thanked Xoliswa for her insight. I characterized the interview as “really good” and said that it is my last scheduled interview. Before the day of the interview, I said I had felt my work was incomplete. I felt desperate about leaving South Africa the following week without the interviews fully satisfying my questions. By the end of my interview with her, Xoliswa had “completed the circle.” She used a melodious Nguni intonation in saying “ah, I’m grateful” and “aheh, I’m happy that you” feel that way.

Summarizing Xoliswa’s interview. Xoliswa was clear that although she heard about mixed methods during her studies at the University of Stellenbosch, it was at Harvard that she really learned about mixed methods. She later surprised herself by

²⁷ To reach Xoliswa’s university from my home base in South Africa, I had first travelled a day by bus. The second day I had rented a car and driven several hours to the closest business area where I had stayed a second night. On the morning of the interview, I had driven over rough but manageable roads to the rural town where Xoliswa’s university was located.

needing to use mixed methods for her dissertation. The most striking theme of Xoliswa interview was that the “colonizing perspective” towards implementing methodology (e.g. rating scales and consent) is gone. Xoliswa did, however, describe cultural differences in thought processes of interviewees related to the learning process. Therefore, researchers must be careful about the amount and nature of probing, and must measure participants’ level of comfort or discomfort. Xoliswa stressed the degree of her anticipatory worry about failing me during our interview, given that as an interviewer herself she does not like to have interviewees waste her time. She expressed relief, however, that I allowed her to be as “beliberated” as she wanted to be in the things she said.

Discourse analysis of Xoliswa’s Interview. I briefly analyze Xoliswa’s excerpt concerning informed consent. Gee’s (2014a) stanza and pronoun tools allowed me to consider the number of first, second, and third person pronouns per segment of text (see Appendix L for stanza transcript and Appendix M for pronouns). From this discursive analysis, I gained that Xoliswa is the agent in her own culturally sensitive work on behalf of U.S. researchers. Particularly because of her I-statements (e.g. “Because I have been working as a consultant, we have looked at the cultural differences”) and her changes from I- to you-statements (e.g. “you immerse yourself with it ... if you are used as an outside eye”) that may serve to reposition herself, I make this assertion.

Cross-Interview Analyses

In quantitative approaches, outliers are often undesirable and excluded from analysis. In qualitative approaches, outliers are desirable and welcomed in discussing findings (Morse, 1995). While I did find similarities across interviews, I also found two kinds of outliers, both of which were helpful and interesting. Among my four interviews,

the three interviews with Brendon Barnes, Amanda Gouws, and Yolandi Foster pointed in a similar direction by their consistent discussion of globally northern political influences on southern African approaches to inquiry. In contrast, Xoliswa Mtose provides an essential differing opinion concerning the importance of not generalizing sources of influence. She pointed out that she and I come from both U.S. and South African worlds, and that we transcend spaces. Xoliswa's interview is an outlier in terms of content whereas Brendon's interview is an outlier in terms of extreme emphasis on the political nature of research, particularly publication.

For analysis across interviews, I present tabulated, discursive, and thematic findings. Appendix N and Appendix O provide tables of narrative findings across interview participants based on features that arose in the process of coding and reflecting. The features pertaining to research in general are context, epistemologies, participant interaction, meaning, and ethics. Features that pertain to mixed methods in particular are definitions of methodological terms, perceptions, meaning, reasons and benefits, dominance, academic formation, cultural knowledge, misuse, and needs. As Braun and Clarke (2006) indicate, features may have been reflected in a quantitative minority of interviews, depending on the degree of emphasis and richness of explanation in a single interview in this case.

Discourse Analysis Across Interviews

Among the tools listed in chapter 3, I identified roughly two clusters: identity, language, and relationships; and politics, economies, and knowledge. I now present these two clusters, followed by a big *D* wrap-up of key points. For the process of analyzing discourse, I created an expanded table distilled in Appendix P.

Identity, language, and relationships. The first cluster of identity, language, and relationships includes identities building, situated meaning, intertextuality, social languages, and relationships building tools.

Identities building. Identities involve a “complex set of practices” (Gee, 2014b, p. 22). We humans enact a broad type of socially significant identity that bubbles up from social and cultural formations. Researchers and the approaches with which they identify are one such type of cultural formation. Because identities are inevitably multiple, researchers may relate both to communities of research approaches, and of socio-cultural geographies. Different communities may or may not agree on labels such as *mixed methods researchers* or *discourse analyst*. Identities are usually “more fluid than labels” (Gee, 2014b, p. 23).

Most of the interview conversations spoke of researchers identities. Brendon Barnes says that methodological camps form identities by which researchers clump each other into baskets. *Qualitative* and *quantitative* are as much about identity as they are about real differences in ways of looking at the world. *Mixed methods* is a political identity among communities of scholars, and recreates the qualitative-quantitative debate. As an example of methodological identities, Brendon says to put two discourse analysts in a room and “see the fight that happens.” If methodological camps comprise identities, and given that several of my participants comment that different disciplines have different leanings toward quantitative or qualitative approaches, I surmise that different disciplines incline toward different methodological identities. In my interview with her, Xoliswa Mtose related students to participants by saying that South African students and

participants are more self-questioning and less arrogant than U.S. students and participants.

Situated meaning. Meaning is situated when listeners or readers construe relevance from what they encounter in the sensory world, for example, by hearing or seeing. As a result, they assign meaning based on contexts (Gee, 2014a). This relevance or meaning is construed through interaction. Yolandi Foster exemplified situated meaning when she says that mixed methods researchers in “the developed world” live in a system where “things work,” where X logically leads to Y which leads to Z. Because developed systems allow this kind of linear logic, mixed methods researchers can follow a recipe and end up with a cake. They can take a questionnaire, implement it, and get results. In contrast to the developed world, South Africa has too many different cultures, ways of being, nuances, influences, and contexts. Things do not work like a laboratory, and one size does not fit all. Therefore, researchers in South Africa cannot “simply take a questionnaire and implement it,” Yolandi says. Researchers must take a more balanced view by incorporating other methods.

Intertextuality. James Gee’s (2014b) intertextuality tool explained that spoken and written words often imply reference to other sets of spoken or written words. I consider intertextuality in terms of little *d* discourse (direct references to other words, speakers, or authors) and in terms of big *D* discourse (indirectly related to ideas that have been implied elsewhere). Figure 5.1 shows the little *d* discourse of mixed methods genealogies for interview participants’ encounters with *formal* mixed methods research. My participants cited methodological parents in South Africa (Kevin Durrheim, Johann Mouton, and Linda Richter), the United Kingdom (Alan Bryman), and the United States

(John Creswell). In general, then, my participants learned about mixed methods from multiple sources. A more in-depth study of mixed methods genealogy in South Africa may form larger clusters related to those my participants mentioned.

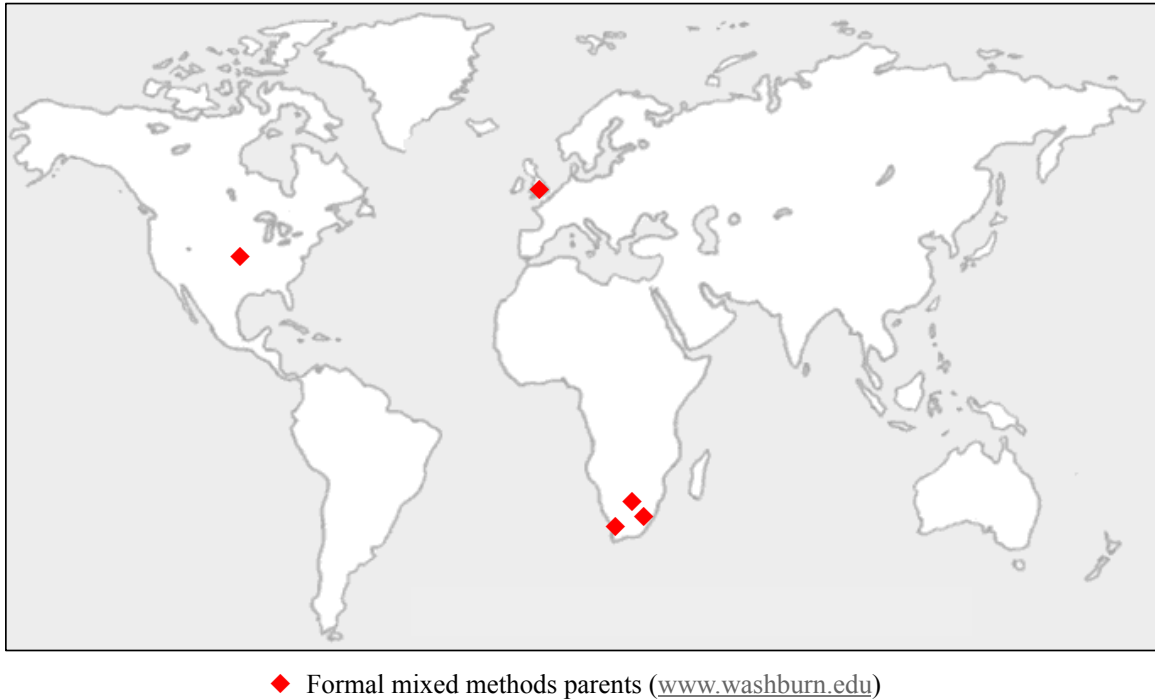


Figure 5.1. Formal Mixed Methods Genealogy Among Interview Participants

Social languages. Social languages are ways of speaking and writing that accompany socially situated identity, including identities of professional practice (Gee, 2014a). In collectivist cultures such as those in southern Africa, social aspects of identities are more important than individualist aspects. People use socially significant forms of language to enact various tasks (Gee, 2014a). In identity communities, significant forms of language may be *specialist* or *vernacular* (Gee, 2014a). Research methodologists and funders may enact specialist vocabularies from their spheres of

influence. In contrast, research or evaluation participants may use vernacular languages, such as South Africa's linguistic *stews*.²⁸

Illustrating specialist language, Brendon Barnes says that methodological labels clump people into methodological baskets. For example, "I'm a mixed methodologist" recreates the qualitative/quantitative divide. He also says that the kinds of questions researchers ask determines the kinds of answers they receive. Regarding non-verbal language, Xoliswa Mtose said to avoid interpreting across cultures. Regarding translation and back-translation of specialist language, Yolandi Foster pointed out that the process is chaotic, and that doing activities can assist with research communication.

Illustrating vernacular language, Xoliswa said that participants in South Africa often must think in one language and answer in another. This is common in all aspects of life but may particularly lead to misinterpretation when a researcher who is unfamiliar with South Africa's linguistic milieu is unaware that participants encounter this process. Outside researchers may problematically assume that questions and answers can be interpreted in straightforward ways. Yolandi Foster pointed out that African people have historically lacked books and questionnaires. Answering questionnaires is therefore exhausting for them. The lack of a common South African language also makes communication between participants and researchers challenging. Amanda Gouws reflects another aspect of vernacular language by saying that many people are not numerate and that hence Likert scales are unnatural. I extend Amanda's comments by

²⁸ Translingual stew is a metaphor I use to describe the hybridity of many different languages within sentences in a way that defies awareness of individual languages (derived from personal communication with Eliam Nxumalo and Pennycook, 2006).

saying that even with a high school education, participants may be unaccustomed to the pervasiveness of numeric thought in globally northern life. On the other hand, Yolandi Foster asserts that African participants love to talk and tell stories, so researchers would do well to take advantage of that. Although Yolandi does not mention it, I am reminded of the potential of the Mmogo-MethodTM that enables participants to visually project their vernacular stories in specialist research contexts; this method allows southern African participants to express their thoughts by manipulating everyday objects (e.g. clay, beads, and grass sticks) into a three-dimensional shape (Roos, 2012).

Relationships building. James Gee's (2014a) relationships building tool looks for evidence of building, sustaining, or changing relationships in any social setting. Applying this to the case of research in South Africa, my participant Yolandi Foster says that African people want to talk and tell stories. Therefore, she recommended basing data collection on storytelling, and allowing time in the research process. She says that "indigenous research [cannot involve] slap-dash work." Furthermore, Brendon Barnes reminds us that research and data collection is interactional rather than "just asking questions and extracting the truth." Brendon goes on to say that answering questions involves "a whole bunch of interactions," and that "an enormous amount of research needs to be done on that."

Politics, Economies, and Knowledge. The second cluster of politics, economies, and knowledge building tools seem more linear than the identity, language, and relationships cluster.

Politics building. Politics involves the notion that "social goods are always at stake" (Gee, 2014b, p. 7). These exchanges of goods involve games. For example,

Brendon Barnes believes that the process of global northerners funding southern research and evaluation is a game. Politics are comprised of social goods such as money, power, and status (Gee, 2014b). Because social goods are at stake in the ways language is used, language is always deeply political. In terms of overcoming the effects of political barriers of oppression, Yolandi Foster says that asking for stories when collecting data is helpful. In terms of large conversations that build political effects, Brendon Barnes says that all research is political. He also says that funders (and I extend his comment to researchers in a northern vein) who try to define a situation and get results too quickly are playing a game.

Economies building. Although Gee (2014a) does not mention economies building as a tool, this notion surfaced clearly in my interview with Brendon Barnes, so I add it as an intermediary stage between politics and knowledge building. The three building tools of politics, economies, and knowledge are so intimately connected in this sequence that it is difficult to separate knowledge from economies. For example, Brendon repeatedly mentioned the phrase “knowledge economy.” More specifically, he explicitly talked about the “politics of the knowledge economy.”

Mixed methods is an economic enterprise to the extent that it is a “white western import” and to the extent that funders determine content and mixed methodology of studies (Brendon Barnes). Spending on mixed methods is a game with the intent of showing good work. Also according to Brendon Barnes, enormous amounts of money are spent on studies with predetermined content and outcomes, rather than on upgrading living conditions. The economy of knowledge is big business. Research is an economic

enterprise relative to the prohibitive expense of necessary team translation and back-translation (Amanda Gouws). Costs for representative samples are also prohibitive.

Knowledge building. Gee (2014a) asserts that “shared cultural knowledge” is an aspect of context. Every cultural context assumes “tremendous amount[s] of cultural knowledge” that speakers need not and do not say (Gee, 2014a, p. 12). When many contexts whirl together, many relevant and important things may go unsaid. As researchers, the kinds of questions we ask determine the kinds of answers we get, as discourse analyst Brendon Barnes says. Similarly, I extrapolate that the kinds of questions we don’t ask determine the kinds of answers we get or don’t get. In turn, the answers we get or don’t get directly influence our perception of knowledge. Improving knowledge helps us improve the questions we ask.

Big *D* wrap-up. Many of the interview conversations that represent larger discourses surface across the cluster of politics, economies, and knowledge building tools. When big-picture relationships go awry, political stances may result. Two interviews primarily reflect a model of research discourse that builds across analytic tools to knowledge. Yolandi Foster connects relationships to knowledge, while Brendon Barnes refers emphatically and multiple times to the political nature of the knowledge economy.

Big *D* discourse is also reflected in comments about mixed methods being a divisive label (Brendon Barnes) and methodology’s need to serve a larger purpose than its own sake (Amanda Gouws). Culturally speaking, the small *d* discourses of western anonymity and confidentiality can result in the big *D* effect of participants losing trust and not listening to researchers (Yolandi Foster). Another participant (Xoliswa Mtose)

conveyed that worlds are coming together with the result that methods are not culture-specific. A most dramatic example of big *D* intertextuality is that northern funders and researchers tend to ask the wrong questions about South African life by spending large amounts of money to show that their studies are good without actually helping people's living conditions.

Themes Across Interviews

Several themes arose from the process of narrating the interviews. These themes include contextualizing theory, methods, and context; building research questions; preferring and training for methodologies; relating interactively; responding to questions; and ticking the box or thinking carefully about ethics.

Contextualizing theory and methods. Methods cannot be decontextualized from ontology from knowledge and that northern journals tend to decontextualize methods from context (Brendon Barnes). Methodology needs to be informed by theory rather than using a methodology for its own sake (Amanda Gouws). Researchers need to accommodate the *context of discovery* (research context including research question) in determining the *context of justification* (i.e., methods) through such means as researcher involvement and training fieldworkers to understand research questions & methodology. Coming from both northern and southern worlds makes it hard to determine cultural influences on mixed methods (Xoliswa Mtose).

Building research questions. In addition to Amanda Gouws' comment in the preceding paragraph, Brendon Barnes also said researchers need to avoid separating methods from context in developing research questions. To get right research questions, the global south needs to "add voice to methods literature" rather than "regurgitating"

what comes their way. Brendon went on to say that mixed methods research questions may be good technically without being good politically or ethically, that funders may “just try to spend money” to demonstrate “that they do good work,” and that researchers need to promote questions that pertain to what the global south thinks is important for developing a country or a city.

Research questions need to guide choice of methodological approach that “makes sense,” and in mixed methods, research questions need to determine sequence vs. simultaneity (Yolandi Foster). Relative to the fixed ways with which some globally northern or U.S. researchers treat research questions, researchers in South Africa need to be more fluid and dynamic with allowing research questions to evolve in the field. South African researchers need to bring in things they “stumble across” in the field, Yolandi said.

Researchers need to “unpack” their research questions rather than expecting respondents to answer research question directly, Xoliswa Mtose promoted. Technical emphasis in research methods results in students who “can do a structural equation model” but “can't answer an research question” (Brendon Barnes).

Preferring and training for methodologies. Choices of methodologies are influenced by the “politics of identity among communities of scholars,” rather than by inherent differences in those methodologies, Brendon Barnes said. Thus, I suspect, may influence that fact that multiple interview participants said preference for methodological approach tends to be discipline-specific. Some who favor qualitative approaches (e.g., in political science) have a “huge stigma against ... very positivistic” methods based more on ignorance than use (Amanda Gouws). Brendon Barnes, in his interview and in his

Barnes (2012) article stated that between 2005 & 2010, 70% of psychological research was quantitative (rather than qualitative or mixed methods), and that the discipline of psychology has a love-hate relationship with mixed methods. Sociology also leans more toward quantitative approaches (Amanda Gouws) whereas education and educational psychology lean toward qualitative approaches to account for differences in literacy and language (Yolandi Foster).

South African methodological training is “about being a generalist” because there are not enough statisticians and specialists (e.g., Brendon Barnes), with an inclination toward qualitative approaches (e.g., Xoliswa Mtose). U.S. students learn methods by doing whereas in South Africa, even lecturers don’t know how to talk about quantitative approaches (Xoliswa Mtose). Most quantitative users have had training abroad (Amanda Gouws). Simple writing and simple training enables effective learning, understanding & motivation to do mixed methods (Xoliswa Mtose).

Xoliswa Mtose said that mixed methods “is a stranger” because South African researchers “shy away from quantitative”. Interview participants learned about mixed methods both formally and informally. Amanda Gouws started to mix without “going out there” to study mixed methods.

Participants mentioned several reasons, benefits, and hindrances of implementing mixed methods. A positive impetus for implementing mixed methods is because problems researchers face are so complex, which is also true in southeast Asia, Brendon Barnes observed. Problems in South Africa are so layered and require “an incredible amount of skill and flexibility to unpack,” that mixed methods serves the problems better than a single approach alone (Brendon Barnes). Implementing mixed methods provides

the ability to see many angles & nuances, resulting in a more complete picture with both depth and a “concrete view” (Yolandi Foster). Qualitative aspect of mixed methods helps interpret what's happening for funders and principal investigators (Brendon Barnes).

A negative impetus for implementing mixed methods (or big intervention research) may be because (especially British) funders say to do so (Brendon Barnes). Northern-related hindrances to implementing a fixed design without flexibility is that South African systems do not allow things to work like a recipe & end up with a cake; South Africa not one-size-fits all (Yolandi Foster). Asserting that mixed methods is how you solve everything makes a third camp rather than solving the paradigm debate between qualitative and quantitative approaches (Brendon Barnes). Amanda Gouws’ discussed the “stupid” National Rating Foundation not considering the time it takes to go into the field and rigorously code qualitative data; I surmise that this may discourage qualitative approaches.

Relating interactively. The importance of relationships was a strong theme, especially with Yolandi Foster. I suspect, though none of my participants stated this, that honoring the role of relationships in South African research may serve as an antidote to the political concerns Brendon Barnes stressed. Brendon himself said that research and data collection are *interactional*, and that researchers cannot “just sit there” asking questions and “extracting the truth.” Participants need time to talk and tell stories as part (Yolandi Foster). Researchers first need to get to know and build trust with participants through as many visits as necessary (e.g., getting a life story), then administer consent, and then start to interact for the purpose of addressing research questions. When South African researchers are not principal investigators (as is often the case among externally-

funded studies), they serve as cultural brokers who interpret the context for funders or principal investigators in contexts of applied studies (Brendon Barnes). By extension, serve as broker between funders, principal investigators, and participant communities who may have different interests and desires.

Responding to questions. “A whole bunch of interactions and motives” influence how people answer questions, a reality that needs an “*enormous* amount of research,” Brendon Barnes said. The reality that even educated people (e.g. teachers) may lack the sort of literacy that completing a survey takes results in much more time needed to complete the survey and then leads to an unidentifiable loss in “interested honest responses,” Amanda Gouws said. “Cultural ways of humility” also affects response processes and the need for probing (Xoliswa Mtose). Methods that fail to capture participant meanings appropriately (“fraudulent” methods) impinge on ways people respond (Xoliswa). The ways in which people respond is constrained by terminology of questions. Because incentives impact answers, it may be best not to tell participants in advance if they will receive an incentive (Amanda Gouws).

Thinking carefully or ticking the box about ethics. Institutional ethics has helped people spend more time unpacking research questions and looking at what they intend to do in the field, Xoliswa said. Informed consent is necessary but requiring ethical clearance “just to go out on the street and ask people whether they smoke or not” goes “a little bit overboard” (Amanda Gouws). From another perspective, ethics and informed consent have become a “tick-the-box exercise” (Brendon Barnes). Researchers are advised not to give too much information during the consent process to avoid biasing a study, but in many situations, that leads to misunderstanding. No matter what the consent

process says, participants expect benefits for their communities to come as the result of a researcher's work on a given study. Ethical considerations and ethics reviews need to look beyond individual studies to include such issues as whether a particular area (e.g., poor township such as Alexandria) has been studied on countless occasions with conditions in the area remaining the same (Brendon Barnes).

I close this cross-interview thematic analysis with an example that intersects relational interactions, response processes, and ethical considerations, an example Brendon Barnes relayed of an interviewer whose understanding of how the government will view results differs from the participant's worldview of satisfaction with their living conditions. An interviewer asks a participant to "rank your dwelling in terms of, are you satisfied or are you not satisfied, from zero to ten," with ten being good. The participant is living in a shack and they say *ten*. The interviewer may say, "Can't be ten! You [are] living in a shack. How about five?" The participant says, "I think, ten." Then the interviewer tells the participant, "Listen, I think you should change your answer to two, because if government happens to see that everyone's saying 'ten', they [are] not going upgrade" your living conditions. Then they'll say, "OK, OK. Put two down then."

Chapter Summary

The current chapter has discussed findings from interviews with four South African professors who had conducted or supervised mixed methods studies. I have titled the narratives of the interviews *Defining Methodologies as Political Identities* (Brendon Barnes), *Not Doing Slap-Dash Work* (Amanda Gouws), *Not Taking a Recipe and Ending up with a Cake!* (Yolandi Foster), and *The Colonizing Perspective Has Gone Away!* (Xoliswa Mtose). Chapter six will present findings from a corpus of written texts by

authors affiliated with institutions in South Africa and chapter seven will discuss the findings of the interviews and corpus of texts together.

CHAPTER 6: FINDINGS FROM CORPUS OF TEXTS

Findings from the corpus of written texts related to several text-external and text-internal dimensions that I consider in this chapter. The most obvious dimensions are external to the texts and include genre (books or book sections, theses, and journal articles), by which I organize sections of this chapter, and year of publication. Also externally, I intend for readers to gain a sense of recency or age of citations, related to challenges accessing northern sources in South Africa, particularly books (see Habib, 2012 concerning the need to address excess profits among northern academic publishers).

A less obvious dimension involves sources of information such as institutional affiliation (text-external) and related methodological genealogy (text-internal) that may give a larger perspective of methodological influence relative to place. My purpose in identifying researchers and locations that serve as key influences in South African mixed methods is three-fold. First, I want methodologists in the global north to gain awareness of southern sources. Second, I want to raise awareness of mixed methods sources in ways limited by northern access to southern publications, as encountered in my own attempts to build this study's corpus. Finally, I want to raise awareness of mixed methods researchers in the global south as human beings rather than as *glorified field workers*, as Brendon Barnes said.

For text-internal dimensions, I considered the use of nomenclature, including specificity and breadth, implicit or explicitly stated mixed methods design among corpus items for which authors conducted a study, and a broad distinction of methodological from applied items by viewing items as methodological when the distinction has been imprecise. Distinguishing the methodological relative to applied focus of each

publication is a matter of judgment for two reasons. First, as Stokes (1997) indicated in *Pasteur's Quadrant*, the relationship between quests for use and understanding in scientific research is independent and orthogonal. For example, methodology was part of an applied purpose in such items as Bayaga and Mtose's (2013) *Quantifying Human Error via Operational Risk Analysis: Ecological Disposition*. Secondly, as Brendon Barnes said in his interview, African worldviews have traditionally led authors to see methodology and application as intertwined.

Books and Sections

None of the nine books in the corpus of texts addressed mixed methods in its entirety. However, several books threaded components of mixed methods throughout discussions of general research (see Appendix Q). Three of these nine volumes were monographs (Bless, Higson-Smith, & Sithole, 2013; Mouton, 1996; Mouton & Marais, 1988) and the remainder were edited volumes. Seven volumes were published in South Africa, one in the United Kingdom (Wagner, Kawulich, & Garner, 2012), and one in the Netherlands (Wissing, 2013b). The six first editors represented the fields of sociology, social work, critical psychology, clinical psychology, educational psychology, and human resources. I roughly discuss the volumes in chronological order, though combining discussions of volumes with multiple editions.

The earliest corpus volume in which a chapter discussed qualitative and quantitative but not mixing approaches was Mouton and Marais's monograph published in 1988. Both Mouton and Marais then affiliated with South Africa's Human Sciences Research Council. In a chapter on *Perspectives on qualitative and quantitative research*, the authors described the two approaches as frequently characterized by a divergent

spectrum. Mouton and Marais (1988) acknowledged a great deal of confusion about the meaning of the commonly used terms, *qualitative* and *quantitative*. They described quantitative approaches as “more highly formalized,” controlled, and “close[r] to the physical sciences.” (p. 155). In contrast, they described qualitative approaches as less strictly formalized, with a less defined scope, and “a more philosophical mode of operation” (p. 166). They exemplified qualitative and quantitative approaches through western-typical content relating to the symbolic content of dreams and investigating EEG wave patterns of dreamers.

Continuing the tradition of discussing qualitative and quantitative approaches separately, the edited volumes by Terre Blanche and Durrheim (1999) and Terre Blanche, Durrheim, and Painter (2006) are key in that they presented African contexts of methodological practices. As an example, Ratele’s, (2006) chapter on *Postcolonial African Methods and Interpretation* portrayed skepticism toward inserting the words *African* or *indigenous* before the word *methods*, perceiving that the inserted words may imply one group viewing another as *other*. Among the volumes’ editors, Martin Terre Blanche was and remains at the University of South Africa; Kevin Durrheim at the University of KwaZulu-Natal; and Desmond Painter at Stellenbosch University. In one chapter, Durrheim (1999, 2006) distinguished quantitative and qualitative research by characterizing qualitative research as providing open, deep, and detailed findings and quantitative research as providing generalizable comparisons. Durrheim exemplified that qualitative data could include autobiographical accounts, interviews, observation, and life stories whereas a quantitative investigation could measure variables such as education levels, motivation to achieve, and mental illness. Demonstrating the volume’s context-

based presentation of research methods, Durrheim (2006) includes a thought-stimulating insert by Robin Palmer of Rhodes University pointing out that failure to make sure that participants have a feeling of ownership in research can lead to “lack of cooperation, resistance, and rejection of research findings” (p. 55).

The first volume to mention combining or mixing methods was edited by then Rand Afrikaans University professor, de Vos (2002b) in his de Vos (2002a) chapter on *Combined Quantitative and Qualitative Approach*. In that chapter, he mentioned difficulty distinguishing quantitative and qualitative approaches, and pointed to a need for information on how to practically combine them. Nine years later, de Vos, Strydom, Delport, and Fouché (2011) heavily focused their volume on the idea of mixing, particularly in Delport and Fouché’s (2011) chapter on *Mixed methods research*. This chapter described mixed methods as combining one or more qualitative and one or more quantitative components (citing Bergman, 2008) but acknowledged “serious scholarly debate” in accepting mixed methods (p. 434). Delport and Fouché (2011) gave the following examples of ways to describe mixing: reducing, displaying, transforming, correlating, consolidating, comparing, or integrating data. They described triangulation as a multi-method approach that lacks a separate methodology (citing Creswell & Plano Clark, 2007), and observed that concurrent and sequential design options “seem to hold whether the research is presented as a single study, or in a multiphase project” (Delport & Fouché, 2011, p. 439). In a separate chapter on ethics, Strydom (2011a) cited northern authors and gave northern examples without drawing from South Africa’s own historical examples. Not surprisingly for a textbook, Delport and Fouché (2011) applied nomenclature with a more specific range of meaning than articles and theses seem to

have done. The strength of the volume is its articulation of mixed methods in a way that does not “regurgitate” globally north voices, as Brendon Barnes cautioned against.

Relative to de Vos, Strydom, Delport, et al. (2011), Maree (2007, 2010) provided an easier-to-read yet not overly simplified volume including a mixed methods chapter by U.S. authors (Ivankova, Creswell, & Plano Clark, 2010). Examples related to the South African context, as the mixed methods purpose statement refers to teachers in the country’s Gauteng province. The authors devoted the volume so fully to the communication process that Jansen’s (2010) second chapter was devoted to *The language of research*, including a fill-in-the-blank statement of a mixed methods research process.

Wagner et al.’s (2012) volume on *Doing social research: A global context*, includes authors from a broader array of global backgrounds than other volumes in the corpus. Among the contributing authors, nine were from South Africa, five from the United States, and one from Norway. Even the chapters by U.S. authors included South African examples, with Kawulich’s (2012) on *Collecting Data Through Observation* as a notable example. Interestingly, Charles Potter’s (2012) *Multi-Method Research* chapter discussed mixed methods, mixed model, and multi-method research. Potter defined *mixed methods research* as collecting or analyzing “quantitative and qualitative data in a single study” with data integrated “at one or more stages,” quoting Creswell, Plano Clark, Gutmann, and Hanson (2003, p. 212). Potter defined *mixed model research* as combining qualitative and quantitative approaches within a strand, stage, or study, or across multiple strands or stages with reference to Teddlie and Tashakkori (2009). He referred to the possibility of “mixing both methods and models within different strands and stages in a *multi-method research* design” (Potter, 2012, p. 168). The distinction between these

terms is not clear to me. I applaud Potter's lengthy example of a multi-method triangulated case study in Johannesburg. However, I am not sure that the meanings of the terms used in the body of the text or in the case study example are clearly well enough distinguished to travel well across global contexts of language use. If Potter intended for the terms to be exchangeable, he did not articulate so.

As the only monograph in the corpus, Bless et al. (2013) gave an example of quantitative, qualitative, and mixed-methods approaches relative to studying education in a community. They illustrated that defining education by number of years of school would be quantitative; by the language of community schooling, qualitative; and combining the two views as mixed-methods. The authors stressed that qualitative and quantitative methods are often blurred. They promoted mixed methods for the purpose of combining advantages and avoiding disadvantages. They then went on to acknowledge that the process of mixing is not simple and can take place at different points in time such as during data collection, analysis, or interpretation. This acknowledgement is helpful for realizing that mixing is not a cookie-cutter phenomenon, to further Yolandi's BAKING²⁹ metaphor.

Wissing's (2013b) volume on *Well-Being Research in South Africa* is the only book in the corpus to have discussed combining or mixing qualitative and quantitative approaches in an applied rather than a methodological context. For a culture-sharing (*ubuntu*) context of career counseling, Maree's (2013) chapter on *Life Design: An Approach To Managing Diversity In South Africa* promoted a current consensus of combining approaches to respect clients, emphasize meaning-making, and to help people

²⁹ Metaphor themes are typically presented in upper case (Loftus, 2011).

understand their personal contributions and stories. To situate the relationship between physical health, psychological well-being, and quality of life in an African context rather than assuming the validity of western models, Thekiso, Botha, Wissing, and Kruger (2013) implemented a sequential explanatory mixed methods design citing Creswell (2009) and Ivankova, Creswell, and Stick (2006). Thekiso et al. described their use of this design “with triangulation of quantitative and qualitative data gathering and analysis methods” (p. 296). To study subclinical eating disorders, Kirsten and du Plessis (2013) implemented a “mixed method, three group pre- and posttest design” (p. 564) for which they cited Morse (2003). Kirsten and du Plessis’s (2013) chapter reported the quantitative data. Given the importance of application in South African contexts, this volume makes an important contribution.

Across the books and chapters of the corpus, I see two themes. The first theme involves the degree to which authors related underlying constructs and the content of examples to local contexts while the second theme relates to how specifically or broadly methodological terms were defined or applied. Given that meaning and understanding of terms varies across learners, lecturers, and researchers in graduate contexts of English medium instruction (see Baird, 2013), I believe it may be important to allow methodological terms to function broadly, without necessitating rigidly tight meaning that negates other terms (see Seargeant, 2010 about the tendency to define terms by isolating specific features of a concept at the exclusion of other features). Having said this, I also believe that each author has an obligation to clarify the ways and scope with which they apply nomenclature.

Theses

The corpus of texts included 37 theses, referring to works at either master's or doctoral levels, given that the terms are used interchangeably in South Africa. The sub-corpus of theses was published completed between 2003 and 2013 with a median year of 2010. All but one of the theses were written in English and the remaining one (Yates, 2012) in Afrikaans at Stellenbosch University. Table 6.1 shows the distribution of the 37 mixed methods-related theses by university and university history (Afrikaans, English, bilingual, merged, or black) in order of descending frequency, along with the year in which the earliest thesis was completed. Importantly, the largest portion of theses (49%) were completed at historically Afrikaans universities and the lowest portions (5% and 3% respectively) at historically black and historically coloured universities. I will reflect on the discrepancy between the portions of theses completed at universities with different histories in the discussion chapter.

Table 6.1. Corpus Theses: Percent Distribution by University History

| University | Percentage (Frequency) | Year of Earliest Thesis |
|---------------------------------------|---------------------------|-------------------------------|
| Historically Afrikaans Universities | 49% (18) | |
| Stellenbosch University ³⁰ | 38% (14) | 2003 |
| University of Pretoria | 8% (3) | 2003 |
| University of Johannesburg | 3% (1) | 2009 |
| Historically English Universities | 27% (10) | |
| University of the Witwatersrand | 14% (5) | 2007 |
| Durban University of Technology | 8% (3) | 2007 |
| University of Cape Town ³¹ | 3% (1) | 2010 |
| University of KwaZulu-Natal | 3% (1) | 2006 |
| Historically Bilingual Universities | 8% (3) | |
| University of South Africa | 8% (3) | 2011 |
| Merged University | 8% (3) | |
| North-West University | 8% (3) | 2008 |
| Historically Black University | 5% (2) | |
| University of Fort Hare | 5% (2) | 2010 |
| Historically Coloured University | 3% (1) | |
| University of the Western Cape | 3% (1) | 2005 |
| Total | 100% 100% | |

³⁰ As I finalize this dissertation in August of 2015, a documentary ("Luister (listen)," 2015) has been released telling stories of 32 students and one lecturer who encountered racial and gender discrimination and violence at Stellenbosch University. In a subsequent electronic news article, the head of South African Parliament's Portfolio Committee on Higher Education and Training, Yvonne Phosa said, "we cannot have a situation whereby a public university's language policy serves as a barrier that ultimately shuts out some students from accessing higher education and training opportunities" ("Portfolio committee calls for Stellenbosch University meeting following allegations of racism and violence," 2015). This situation, along with the few number of dissertations from historically non-white institutions, will provide food for thought as I continue to analyze findings from this study beyond my dissertation.

³¹ University of Cape Town is Africa's highest ranked university, according to Cloete, Bailey, Pillay, Bunting, and Maassen (2011).

I present theses according to university historical types, sequencing universities in descending order of frequency within type. From there I consider author affiliation, in part to further understand where in South Africa the work of mixed methods is clustering relative to the historical nature of the universities. I do not discuss theses from a historically coloured university because I was not able to obtain Phillip's (2005) thesis that was completed at the University of the Western Cape. Rather than discussing every thesis within each university, I focus primarily on theses with a text-internal dimension of methodological, evaluative, or assessment foci. Table 6.2 shows the percentage of methodological, evaluative or assessment, and applied theses.

Table 6.2. Corpus Theses: Percent Distribution of Type of Focus

| University | Percentage |
|-----------------------|------------|
| Methodological | 14% (5) |
| Evaluative/Assessment | 20% (7) |
| Applied | 69% (24) |
| Total | 100% |

Historically Afrikaans Universities

Stellenbosch University. Historically Afrikaans Universities represented in the corpus include Stellenbosch University (formerly the University of Stellenbosch), the University of Pretoria, and the University of Johannesburg (formerly the Rand Afrikaans University). More corpus theses were published at Stellenbosch University (38%) than at any other university in South Africa, including six with methodological, evaluative, or assessment foci and eight with applied foci. At Stellenbosch University, I view Johann Mouton as the father of modern research methodology in South Africa due to his theoretical contributions, his contribution of the earliest item in the corpus of texts (see Mouton, 1983), and Amanda Gouws' discussion of him. Mouton supervised more theses

than any other supervisor represented by the sub-corpus of theses, including two methodological theses for which he was the primary supervisor and one evaluative thesis that he co-supervised.

Under Mouton's supervision at the Stellenbosch University, one master's thesis (Kyeyune, 2010) focused on mixed methods by attending to its use and interpretation in program evaluation. Kyeyune analyzed fourteen cases of mixed methods evaluations, none of which originated in or pertained to South Africa, and identified two trends of strong (with a focus on mixing) and weak (lacking a focus on mixing) mixed methods evaluation designs. A notable theme of his findings regards "vagueness and discrepancies between authors' assertions and implementation" (Kyeyune, 2010, p. 129). He particularly noted such discrepancy among studies where a qualitative component was intended to compliment a primary quantitative component. A related discrepancy involves referring to sequential mixed methods designs with the qualitative following the quantitative component. Even at the master's level, Kyeyune provides an insightful discussion from his review.

Also under Mouton's supervision, Boshoff (2012) implemented a mixed methods study to inform *Knowledge Utilization in the South African Wine Industry*. His thesis exemplified a methodological focus for a relatively applied purpose. Boshoff considered knowledge as "factual (know-that) or practical (know-how)" and viewed utilisation as a typology of "instrumental, conceptual, symbolic and persuasive" components (p. ii). Boshoff's study does not describe timing or a particular mixed methods design, although I infer that the design was quantitatively dominant based on the portion of discussion devoted to the web survey relative to the individual interviews.

Groenewals and Mouton co-supervised Abrahams' (2003) doctoral thesis, the earliest of four South African theses focusing on evaluation. Abrahams promoted theory-based evaluation of South African community development. Particularly, his thesis is notable for its warning (citing Chen, 1997) that promoting mixed methods could increase the myth that problems with evaluation arise from faulty methods rather than from a need to understand underlying mechanisms and assumptions on which intervention programs are based.

Amanda Gouws, whom I interviewed, also supervised of two applied mixed methods theses by Saal (2010) and Wildschut (2011) at Stellenbosch University. In her master's thesis, Saal (2010) cited the only northern-based sources relating to mixed methods. These sources included Jick (1979), Shulman (1986), Greene, Caracelli, and Graham (1989), and I. Newman and Benz (1998) with an average year of 1988. For broader methodological purposes, her citations included both northern and South African sources. Northern sources included Merton, Fiske, and Kedall (1956), D. L. Morgan (1988), Czaja and Blair (1996), De Lain (2000), Babbie and Mouton (2001), Bradburn, Sudman, and Wansink (2004), Padgett (2004), Williams (2004), Maxwell (2005), and Hesse-Biber and Leavy (2006) with an average year of 1996. In contrast, South-African sources included Bless and Higson-Smith (1995), Van Dongen (2003), Trotter (2005), and Mouton (2008) with an average year of 2003. In short, Saal (2010) cited older northern than South African sources. This may be explained by the fact that Saal's supervisor (Amanda Gouws) studied in the United States in the late 1980's around the years of Saal's mixed methods citations.

In the second thesis supervised by Amanda Gouws, Wildschut (2011) identified her doctoral thesis as *approximating* a mixed methods study in that she used an interview schedule for specific interview questions and conversationally conducted the remainder of each interview including many questions that surfaced during the interviews. She then analyzed by starting with four themes and cited Basit (2003) concerning coding.

Interestingly, Wildschut used the term *meso-analysis* in reference to analyzing not only individual cases of women but also considering cultural and institutional influences, somewhat as I am doing in this dissertation! Wildschut makes no other mention of mixed methods. However, in my interview with Amanda Gouws, she described Wildschut's thesis as *mixed methods* in that existing record data served as a quantitative portion and the interviews as a qualitative portion. Wildschut's thesis talks about both record and interview data but does not describe those two forms in relationship to mixed methods.

Also from Stellenbosch University, I detail a master's thesis supervised by supervised by Marius Ungerer and written by Andries Gouws (2012) on the assessment of location of jewelry store locations. Before I discuss Gouws' description of his design, I reproduce (and adapt by overlying the red box pointing to the location of *mixed methods*) a diagram (see Figure 6.1) by which Gouws (2012) illustrated his perception of methodological choices from philosophies through techniques and procedures. This diagram shows more levels of choices than I observe are frequently presented in the United States, where Crotty's (1998) four levels of epistemology, theory, methodology, and methods seem common. Andries Gouws' (2012) perceptions relied heavily on the United Kingdom's University of Surrey-based Saunders, Lewis, and Thornhill (2007) whom corpus authors Bayaga and Moyo (2009) also cited.

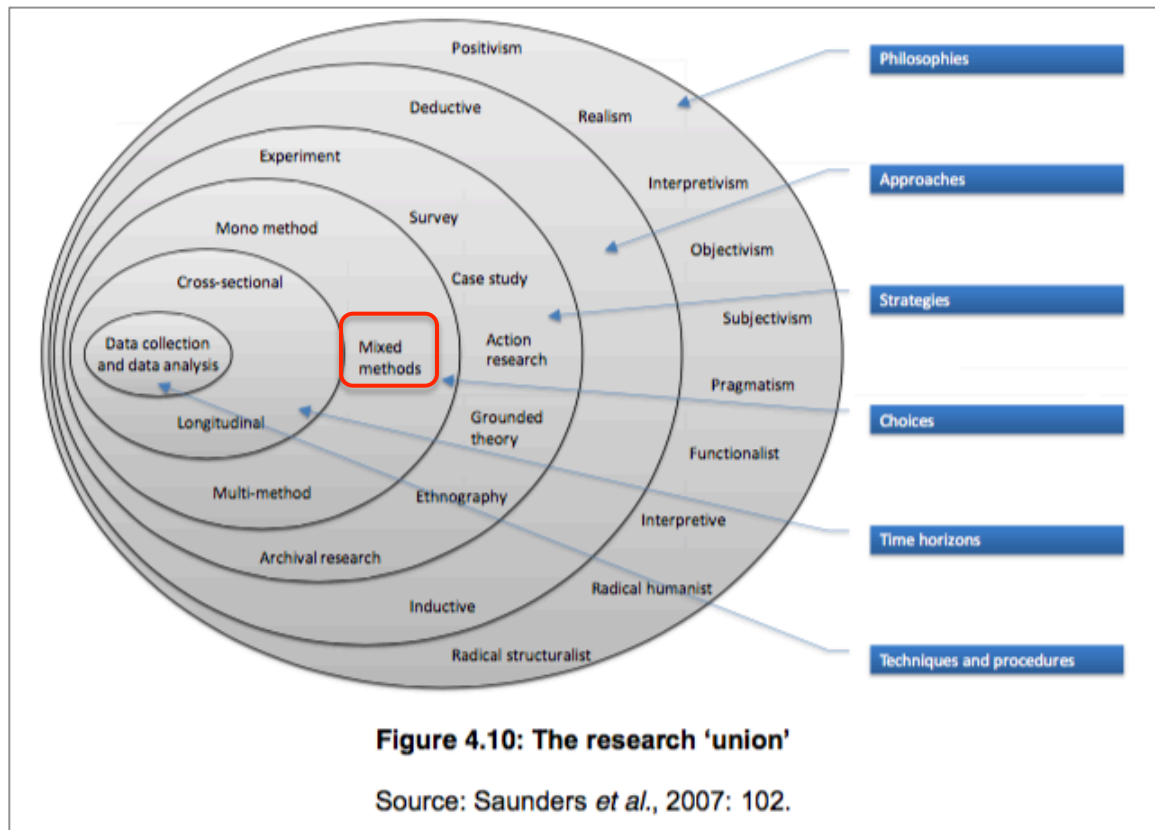


Figure 6.1. *The Research 'Onion'* (Andries Gouws, 2012, p. 37)³²

Andries Gouws (2012) articulated a design that I quote for a sense of South African methodological discourse:

The problem statement and research objective led to choice of a mixed method research as the appropriate research design. A *concurrent embedded data collection method* was followed with the primary focus on quantitative data and

³² Figure 6.1 reproduces Figure 4.10 as *The Research 'Union'* from Andries Gouws (2012, p. 37) who in turn recreated Figure 4.1 from Saunders et al. (2007, p. 102). Importantly, Saunders et al.'s (2007) original figure was titled *The Research 'Onion'*. I reproduce Figure 6.1 and Figure 6.2 with open permission from Stellenbosch University (*Policy in respect of exploitation of intellectual property*, 2010).

qualitative data as secondary focus to obtain a broader perspective on the quantitative data obtained (p. 4, italics added).

Andries Gouws' (2012) diagram (see Figure 6.2) also uses the nomenclature of *concurrent embedded design*. Because I find no articulation of the study's integration or mixing process, I am not clear whether the framework of Creswell and Plano Clark (2011) mixed methods designs would identify the study as a convergent or an embedded design. Andries Gouws (2012) does articulate that the two questionnaires he developed included open-ended introductory questions, rating questions statements for gap analysis, and concluded with additional open-ended questions. Absent any discussion of quantitative and qualitative components beyond the questionnaires, I assume that Andries Gouws associates mixed methods nomenclature with designing and implementing questionnaires that include both opened- and closed-ended questions.

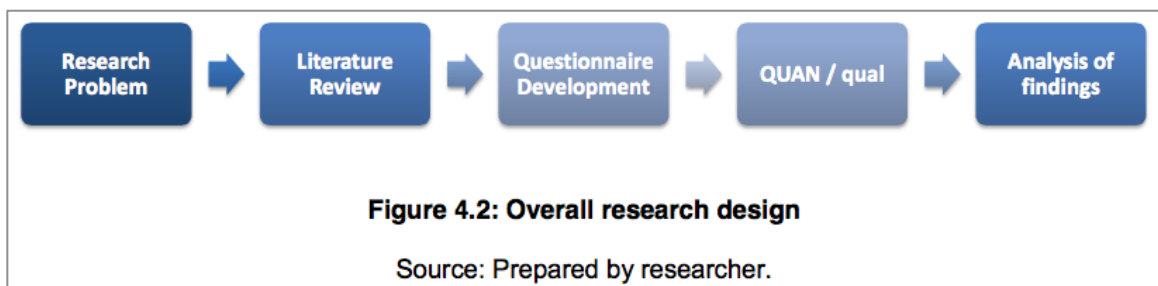


Figure 6.2. Summary of Andries Gouws' (2012, p. 39) *Concurrent Embedded Design*

University of Pretoria. A professor of educational psychology at the University of Pretoria, Kobus Maree has published over 35 items (including articles, volumes, and chapters) as first author, including editing *First Steps in Research* (Maree, 2007) that I discussed under Books and Sections. Within the corpus, Maree supervised Wagner's (2003) doctoral thesis that explored curricula for social science research methodology. In her thesis, Wagner cited Mouton and Muller (1997) concerning the production of

knowledge in South Africa and the popularity of “alternative methodologies” (Wagner, 2003, p. 172) that arose in response to apartheid (I assume that *alternative methodologies* correspond to Wagner’s, 2003 mention of *alternative paradigms to positivism* (p. 2); see also my discussion in chapter 4 concerning the role of so-called statistics during apartheid). Wagner went on to describe mixed methods in psychology as incorporating “qualitative research to augment quantitative research,” citing Polkinghorne (1991) and Tashakkori and Teddlie (2003a) without mention of South African relevance in her description of mixed methods. One of Wagner’s participants explained that students want quantitative more than qualitative course modules because they are more familiar with quantitative ideas from the evening news (via "Ipsos Markinor, South Africa," 2015). Note that Claire Wagner went on to publish an article (Wagner, 2009) and an edited volume (Wagner et al., 2012) also in the corpus of texts.

University of Johannesburg. At the University of Johannesburg, Professor De Bruin supervised Arndt’s (Arndt, 2009) applied doctoral dissertation in the field of psychology titled *Attitudes towards bisexual men and women: The relationship between respondents' attitudes and their sexual orientation*. Arndt implemented a mixed methods design comprised of three sequential phases of data collection that emerged from the study. He identified the quantitative priority of the study and cited Hansen, Creswell, Plano Clark, Petska, and Creswell (2005) concerning sequential designs for unexpected findings. He started with a quantitative survey for which he implemented a biographical questionnaire based on the Attitudes Regarding Bisexuality Scale (ARBS-FM) (Mohr & Rochlen, 1999) and the Sexual Orientation Scale (Berkey, Perelman-Hall, & Kurdek, 1990) among 459 conveniently-sampled undergraduates. Among other authors, Arndt

cited articles by Roger Tourangeau and Smith (1996) from the *Public Opinion Quarterly* and by Roger Tourangeau, Rasinski, Jobe, Smith, and Pratt (1997) from the *Journal of Official Statistics* about sensitivity in surveys that relate to sexual behavior.

Because the reliability of the ARBS-FM was lower than Arndt wanted, he continued with a second phase for which he organized an expert group of 11 cultural interpreters including a range of black, white, coloured, and Asian men and women. The experts included nine intern psychologists, one cross-cultural counseling psychologist, and the study's supervisor. The group served to inform Arndt about when participants did not understand a question item, and enabled him to qualitatively adapt the items to complement the quantitative phase. For this second phase, Arndt cited Hambleton, Merenda, and Spielberger (2005) about the need to adapt items and Patton (1990) about the need to gather data through a variety of methods. He thematically analyzed the discussion of the expert group, citing Boyatzis (1998) and Braun and Clarke (2006).

In a third phase, Arndt revised the ARBS instruments and the Sexual Orientation Scale to 578 conveniently sampled undergraduates. He found a two-factor model (tolerance and stability) for the female and male versions of the ARBS. Through differential item functioning and differential test function, Arndt removed items that favored black or white groups. He found negative attitudes among both homosexual and heterosexual students toward people who were bisexual.

To conclude this discussion of Arndt's article, he provided one of several sequential designs in the corpus. I commend his use of citations from strong northern journals and volumes and note his lack of citing South-African based literature. Interestingly, as with many designs labeled *mixed methods*, similar designs have been

fielded with literature on survey methodology without the label *mixed methods*, showing the importance of looking for a study's components rather than only looking for large umbrella labels when searching for items.

Historically English Universities

University of the Witwatersrand. A different professor supervised each of the five theses completed at the University of the Witwatersrand, two of which were evaluative and three of which were applied. Notably, Brendon Barnes both completed his (2007) doctoral thesis and later supervised Baldry's (2013) master's thesis at the institution. In his own thesis, Barnes implemented a mixed methods evaluation of a behavioral intervention to reduce the impact of indoor air pollution through a design that, though unarticulated, was clearly explanatory sequential. Under a different supervisor, Luppe (2010) implemented an unarticulated mixed methods design that I have not been able to infer for the purpose of evaluating a grassroots soccer club for HIV prevention.

Durban Institute of Technology. Nundulall's (2010) thesis titled *Mentorship as a Strategy to Improve Research Output at Tertiary Institutions: A Case Study of University of Johannesburg* is the only methodological dissertation from a technical institution (Durban Institute of Technology). Her thesis related to the topic of increasing high impact publications that attract subsidies from South Africa's Department of Higher Education and Training. In defining mixed methods, Nundulall cited Tashakkori and Teddlie (1998) concerning combining qualitative and quantitative approaches in a single or multiphase study and de Vos (1998) concerning mixing "aspects of the qualitative and quantitative paradigm at all or many methodological steps" (p. 66). Nundulall (2010) gave advantages of mixed methods (validity, complementarity, developing one approach

from another, and providing fresh perspectives and contributions) and disadvantages () citing a website that has since been closed (UK Geocities, 2007).

Also at the Durban Institute of Technology, I call particular attention to the thesis of Talmage (2007), who articulated an exploratory mixed methods design to determine factors in chiropractic patient satisfaction. Concerning focus groups, Talmage highlighted that “even to an English speaker that words out of context would have different meanings” (p. 27). Notably, he cited Scollon and Scollon (1995) to say that “even if the words were translated accurately, the meaning of a particular phrase or the combination thereof may become unclear to different cultures even when the same words are used” (p. 26). Talmage acknowledged, and I emphasize, that beyond words and phrases, *interpretation* is key to meaning.

Historically Bilingual University

At the English-Afrikaans bilingual University of South Africa, a distance-learning institution, three corpus theses were completed under three different supervisors. I discuss the dissertation that Patrick Ngulube supervised because I invited him to participate in an interview relative to his prolific syntheses of mixed methods studies in library science. Marutha (2011) completed her applied master’s thesis on record management under Ngulube. She described her study as a survey for which she used mixed methods and collected data via questionnaires, observation and interviews. Because she used mixed methods, Marutha said that she “incorporated, consolidated, compared and integrated” both forms of data, citing Creswell (2003) and Creswell and Plano Clark (2007) accordingly, one of few citations of Creswell and Plano Clark’s *Designing and conducting mixed methods research* in the corpus. Concerning

nomenclature, Marutha defined mixing descriptively, though she does not give detail as to how she did so. At the same time, she used the term *survey* rather broadly. These varying breadths of meaning for different terms are not uncommon in the corpus.

Merged University

North-West University was formed in 2004 by the merger of the historically Afrikaans Potchefstroom University for Christian Higher Education and the historically black University of Bophuthatswana. Of the three corpus theses completed at North-West University under three different supervisors, I discuss I.-M. du Toit's I.-M. du Toit (2010) master's thesis entitled *Educational interpreters and the Tomatis Method: A mixed methods study at the North-West University*. Her thesis regarded university classroom translation from Afrikaans to English and took the form of a manuscript prepared for submission to the Journal of Psychology in Africa. I.-M. du Toit cited Ivankova, Creswell, and Stick (2006) concerning mixed methods combining quantitative and qualitative methods to better understand a research problem. She identified her design as a *mixed methods triangulation* (citing Creswell & Plano Clark, 2007) in that she implemented both methods concerning the same phenomenon, within the same time frame, and with equal priority. I note that I.-M. du Toit's discussion of trustworthiness aligns with Xoliswa Mtose's mention of Lincoln's aspects of trustworthiness. Xoliswa mentioned Lincoln's five aspects of rigor and trustworthiness, which I believe pertained to Lincoln and Guba (1985). I.-M. du Toit mentioned Guba's four criteria for which she referenced Shenton (2004) and Krefting (1991), both of which referred to Lincoln and Guba (1985). Academic voices of the past five years have cited voices of thirty years ago. Without reason to believe that Xoliswa Mtose and I.-M. du Toit have directly influenced

each other, it is interesting that multiple voices at multiple institutions refer to the same sources.

Historically Black University

As I have mentioned, two doctoral-level corpus theses were completed at the historically black University of Fort Hare. My participant, Xoliswa Mtose, supervised N. Moyo (2010) and Murugan (2011). I discuss Moyo's (2010) thesis entitled *An Investigation into the Efficacy of Interventions by Multisectoral Organisations in Enhancing Educational Opportunities for School-Going Orphaned Children in Gwanda District in Zimbabwe*. For her design, Moyo refers to the *compatibilist thesis* of Johnson and Onwuegbuzie's (2004) well-known article entitled *Mixed Methods Research: A Research Paradigm Whose Time Has Come*. Moyo furthers a strong discussion of positive, post-positive, constructivist, and pragmatic paradigms including references to D. C. Phillips and Burbules (2000) and Reichardt and Cook (1979). Citing Ivankova, Creswell, and Plano Clark's (2007) chapter from corpus volume *First Steps in Research* edited by Kobus Maree, Moyo references Creswell³³ as saying that mixed methods mixes quantitative and qualitative data at some point during the research process of a single study for the purpose of more completely understanding a problem. As with a number of items in the corpus, I suspect that the reason Moyo referred to Creswell via Ivankova et al. (2007) and not directly is that she had access to the South African *First Steps in Research*, but not to Creswell's (2008) volume cited in Ivankova et al. (2007).

³³ As a formatting note, when referring to references cited within a text, all corpus items provided name only and not year.

Summary of Theses

Across methodological theses, I noticed a tendency toward articulation terms with narrower range of meaning, toward awareness of theoretical contributions, and toward astuteness concerning mixed methods designs. The applied theses were equally as diligent but seemed less strict and more creative in their use of terms.

Among some authors, there appears to have been a tendency to cite older sources than would be the case in the U.S., either by citing older editions than were available at the time of publication or by citing older works for which recent editions do not exist; for example, Nundulall (2010) cited Tashakkori and Teddlie (1998), de Vos (1998), and UK Geocities (2007). Multiple reasons may explain that tendency. The most plausible reason is the difficulty of accessing volumes that originate outside South Africa (See (Genesis Analytics) regarding import tariffs on books). A possible reason more tacit and purely speculative relates to the reality that African life tends to move at a slower pace and that people of Africa have traditionally respected older people and older things. This hypothesis would need to be studied among South African academicians to contemplate any degree of validity.

Journal Articles

For the 49 journal articles in the corpus of texts Figure 6.3 shows the year of publication with an exponential increase from the earliest article in 1983 until 2013. Figure 6.4 shows the continent of publication. All but one of the articles (Peltzer & Phaswana, 1999) were peer-reviewed. Two were in Afrikaans (Maree & Louw, 2007; Mouton, 1983) and the rest were in English. Not surprisingly, the Afrikaans articles were

among the earlier articles published. More than half (52%) of the corpus articles came from the fields of education, educational psychology, or psychology (see Table 6.3).

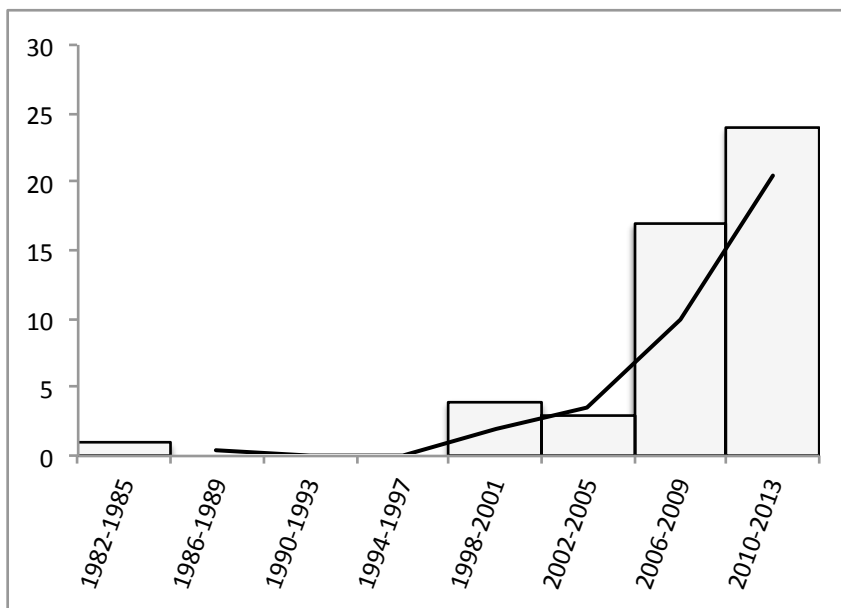


Figure 6.3. Corpus Journal Articles: Year of Publication

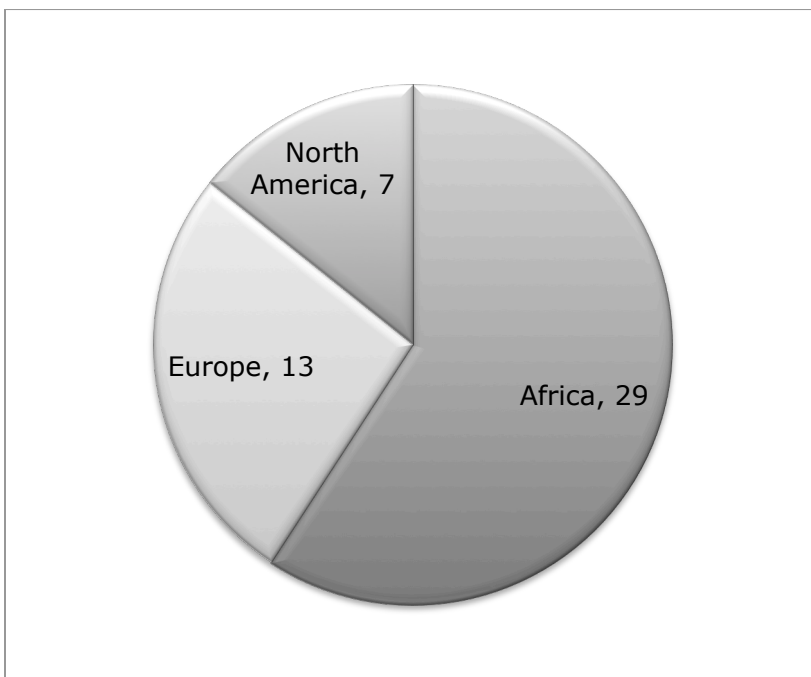


Figure 6.4. Corpus Journal Articles: Pie Chart of Continent of Publication

Table 6.3. Corpus Journal Articles: Percent Distribution of Disciplinary Field

| Disciplinary Field | Percentage |
|-----------------------------|------------|
| Education | 24% (12) |
| Psychology | 18% (9) |
| Educational Psychology | 10% (5) |
| Health | 22% (11) |
| Library Information Systems | 8% (4) |
| Risk Assessment | 6% (3) |
| Sociology | 4% (2) |
| Criminology | 2% (1) |
| Social Work | 2% (1) |
| Theology | 2% (1) |
| Total | 100% |

Roughly two in three articles (63%) related to applied research while the others focused on methodological content. Due to similar structures and purposes between methodological and applied articles, I use that distinction to organize discussion of individual articles. Speculating that methodological foci point toward the future of research methodology, I discuss articles with a methodological focus before discussing those with an applied focus.

Methodological Journal Articles

Among the 20 methodologically focused articles, Table 6.4 shows frequencies and descriptions of methodological purposes including theoretical, methodological review, assessment or evaluation, and academic process of methodology. Of the seven methodological reviews, four articles reviewed South and Sub-Saharan African mixed methods studies in library information systems (Ngulube, 2010, 2012, 2013; Ngulube, Mokwatlo, & Ndwandwe, 2009) and one reviewed South African mixed methods studies in psychology (Barnes, 2012). The remaining two methodological reviews covered South African studies of any methodological approach that concerned the topics of youth resilience (L. C. Theron & Theron, 2010) and quality of education (Motala, 2001). Terms

related to *mixed methods*, *mixed method*, *mixed-methods*, or *mixed approach* appeared in 13 of the 20 methodological articles. The terms *combined*, *blending*, *hybrid*, *triangulation*, or *integrational* each appeared in one methodological article; and the terms *qualitative* and *quantitative* without reference to *mixing* appeared in four articles. For details of two exemplar methodological journal articles (Barnes, 2012; Ngulube et al., 2009), see Appendix R.

Table 6.4. Corpus Journal Articles: Purpose of Methodologically Focused Items

| Methodological Purpose | Frequency | Description |
|------------------------|-----------|--|
| Theoretical | 4 | Mixed methods (2) Quantitative & qualitative separately (1) Promoting qualitative over quantitative (1) |
| Methodological review | 7 | Mixed methods (5) Qualitative, quantitative, and mixed methods (2) |
| Assessment/evaluation | 7 | Community-based/participatory (2) Forensic interviews (1) Risk assessment (1) Applied fields (3) |
| Academic process | 2 | Teaching qualitative, quantitative, and mixed methods (1) Auto-reflection on mixed methods dissertation process (1) |
| Total | 20 | |

Articles that reviewed mixed methods studies indicated issues with explicating or implementing the approach. In the field of library and information science, Ngulube et al. (2009) pointed to such problems as not appreciating or stating the challenges of conducting mixed methods, of co-presenting quantitative and qualitative approaches without mixing, of not stating the purpose of mixing, and that few researchers are good at both quantitative and qualitative approaches. They also pointed to a need for harmonious interactions across epistemologies, disciplines, teams, power, and money; recommend that postmodernists deconstruct the meaning and nature of mixing; and of determining why more South African researchers do not use mixed methods.

In the field of psychology, Barnes (2012) also pointed to a need for more mixed methods in South Africa. Philosophically, he described the intersubjective nature of pragmatism that rejects dualism. Furthermore, he forwarded a transformative stance against oppression, and asserted that researchers are obliged to understand and challenge processes that maintain the status quo. He promoted transdisciplinary dialogue in the process of conducting mixed methods. In promoting the legitimation of mixed methods, Barnes (2012) recommended minimizing weaknesses. On the whole, this article is as theoretical and more methodological than Brendon's other work. Notably, it is the article that Brendon said in his interview was encountering a love-hate relationship among readers given the "parochial nature of psychology."

An article that discusses implementation of questionnaires from a constructivist standpoint was authored by Romm (2013), an adult education professor at the University of South Africa. The article includes the following sections:

- "traditional usage of questionnaires" (p. 654);
- Weberian interpretivism;
- a "constructivist-oriented (qualitative) position" (p. 655);
- "reflexivity, transparency, and discursive accountability" (p. 657);
- "re-tuning questionnaires" to rethink "'restrictive' cultural constructions" (p. 659);
- "using a questionnaire for pedagogical purposes" (p. 659); and
- "using a questionnaire to raise awareness of 'taboo' topics" (p. 661).

In the constructivist-oriented section, Romm (2013) cites the following authors concerning mixed methods: Lincoln and Guba (2003) (as implying that qualitative

researchers use statistical methods to some extent), Flood and Romm (1997), Torlak (2001), Creswell (2003), Creswell, Shope, Clark, and Green (2006), R. B. Johnson et al. (2007), Fielding (2010), Hesse-Biber (2010), and Mertens (2010b) with a median year of 2006. Relative to my analysis of Saal's (2010) applied master's thesis, Romm's methodological citations are more contemporary. In terms of nomenclature, the titles of the earliest two sources interestingly referred to *multimethodology*.

In a more reflective vein, and because of her discussion of methodological formation not articulated elsewhere in the corpus or interviews, I detail Evans' (2010) auto-reflection on the process of completing a mixed-methods thesis. Evans articulated several choices graduate students face including the focus of their inquiry, epistemological framework, research design, and research methodology. She expressed that common knowledge expects research questions, design, and methodology to be based in existing literature. In reality, a topic may be based on a project in which a student has been involved. Research questions and data collection protocols may be determined by a supervisor's preference. As Huberman and Miles' (2002) indicated, the process of determining a research design is often over-simplified such that, contrary to expectation, study designs may not flow from the topic of investigation. Consistent with Brendon Barnes' portrayal, the designs of grant-funded studies are often dictated by funding organizations, Evans said. In spite of their complexity, these decisions "may have ethical implications [or] contaminate data" (Evans, 2010, p. 100).

When Evans (2010) started her doctoral program, she was as a quantitatively trained scholar without theoretical grounding. However, because of her background in teaching language, she was more comfortable with analysis and interpretation of texts.

Regardless, she had been affected by the “hegemony of statistical methods” and was unfamiliar with qualitative paradigms (p. 102). Merriam (1998) introduced Evans to considerations about the nature of reality and about knowledge production. She began to realize the intensity of struggle between quantitative and qualitative paradigms, each claiming superiority and mutual exclusivity. From R. B. Johnson and Onwuegbuzie (2004), Evans learned of a quantitative, qualitative, and mixed methods “trilogy of paradigms” (p. 102) that she learned was also called *methodological pluralism*.

Throughout these philosophical wonderings, R. L. Miller and Brewer (2003) served as a guide. From R. M. Thomas (2003) Evans learned about options for quantitative and qualitative components to serve dominant and complementary roles. Evans’ (2010) article reflected more familiarity with philosophies of methodologies than any U.S. mixed methods dissertation I have encountered. On the whole, this article illustrated that the most well planned thesis will likely proceed differently than intended for reasons beyond the author’s control.

Applied Journal Articles

Applied journal articles before 2010. Among the 30 applied articles and for a sense of change across time, I distinguished articles published before 2010 from those published in 2010 or more recently. The 18 pre-2010 applied articles used terms in less precise ways than in later years. For example, L. C. Theron (2004) used the term *qualitative research design* to describe an investigation that she identifies as empirical for the sake of compiling a group profile and for which data collection included structured questionnaires, “an incomplete sentence questionnaire,” and projection techniques (p.

319). This contrasts with Theron's clearer use of the term *mixed methods* in later articles such as her (2010) review.

Beyond nomenclature, notions of validity in earlier applied articles are concerning. For example, van Rensburg and Barnard (2005) said that although the psychometric instruments "have not been specifically standardized for South African conditions, each of the measures has been found to have acceptable reliability and validity coefficients" (p. 5). Health care seems to relate combined quantitative and qualitative validity to "compliance with standards," as Muller (2000, p. 64) implied, apparently relative to Council for Health Service Accreditation of Southern Africa, which in turn is based on standards from the International Society for Quality in Health Care ("Cohsasa: The Council for Health Service Accreditation of Southern Africa," 2015).

As with numerous northern articles (e.g. Gregorio, 2003³⁴), two earlier articles in the South African corpus were part of larger mixed methods studies or programs of study. The formative assessment of Barnes, Mathee, Shafritz, Krieger, Favin, et al. (2004) was part of a larger evaluation program that evolved into a mixed method design as Barnes (2010) described. Similarly, the qualitative phase reported by Draper and Louw (2007) was part of a larger mixed methods study. In addition to the challenges of northern authors in discussing entire mixed methods studies in a single mixed methods article, South African mixed methods authors also face the challenge of provide content and context-relevant information as Brendon Barnes explained in his interview.

³⁴ Gregorio's (2003) article was quantitatively-dominant as part of a larger qualitatively dominant dissertation.

Applied journal articles between 2010 and 2013. Among the 12 applied articles published in 2010 or more recently, Casale, Nixon, Flicker, Rubincam, and Jenney (2010) illustrated the need to contextualize methods in theory, consistent with recommendations from the interviews. The purpose of the article by Casale et al. was a critical sociological analysis presented by means of a mixed-methods evaluation. As with the earlier Barnes, Mathee, Shafritz, Krieger, Favin, et al. (2004) and Draper and Louw (2007), Casale et al. (2010) presented theoretical analysis of a qualitative phase of a comprehensive, five year evaluation.

The article by Chipunza and Gwarinda (2010) is the first example I have seen of articulating a positivist view (citing Newman, 2000) as a reason for collecting quantifiable information. Because of the seemingly unusual nature of adopting a positivist perspective to measure transformational leadership, I wonder if the authors may have lacked awareness of tacit aspects of a positivist paradigm or of distinctions between positivist and post-positivist paradigms, perhaps related to research literacy. Contrary to the cautions of Amanda Gouws and Yolandi Foster, the article does not indicate taking particular cautions concerning the Likert scales they administered. Furthermore, they reported Cronbach-alpha coefficients in a multidimensional context with a sample size of $n=153$.³⁵ This may have represented lack of familiarity with statistical methods, although many statistically trained U.S. researchers entertain the same misconception. On the whole, the article by Chipunza and Gwarinda (2010) seems to lack methodological awareness.

³⁵ In part because the formulation of Cronbach's alpha is based on sample size, the statistic may not be reliable and may over-estimate correlations (Schmitt, 1996).

Among articles with an applied focus, authors tended not to discuss a paradigm, a mixed methods purpose, or how they mixed quantitative results and qualitative findings. This may be due to a combination of lacking awareness or lacking article space. To the extent South African authors of mixed methods articles want to include applied content (as Brendon Barnes recommended in his interview), space for methodological discussions may be more limited than for globally northern authors who include minimal content. Considering also that verbal and written styles in African contexts are less linear than in the U.S., limitations on how much authors can say are more severe in effect.

Findings Across the Corpus of Written Texts

In terms of text-internal dimensions, the corpus includes items with various styles of writing. Not surprisingly and on the whole, book chapters referenced mixed methods more formally than other genres. With the exception of Wissing (2013b), all books served as textbooks and were methodological in focus. Relative to theses and journal articles, chapters in edited volumes were organized with more structure regarding aspects of mixed methods (e.g., with sections for definitions and reasons for mixing methods)³⁶ and used nomenclature in more specifically defined ways. Relative to books and book sections, the sub-corpora of theses and journal articles each varied in the degree to which they organized mixed methods topics and also applied nomenclature with varying degrees of specificity. Among theses, 69% had an applied focus relative to journal articles among which 59% had an applied focus. Relative to functional focus,

³⁶ Monographs were an exception to the tendency toward organized sections in that the authors distributed mentions of mixed methods throughout the volume without dedicating a single chapter to the approach.

methodological items on the whole seemed to apply nomenclature in more specific ways than did applied items with only an applied focus.

Time is also an important theme across the corpus of texts, both text-internally and text-externally. In terms of citations, methodological items seemed to include more recent references (e.g. Romm's, 2013 article on constructivist questionnaires) than did applied items (e.g. Saal's, 2010 thesis on obstacles that prevent government participation). More extensively, I reflect on items both in the corpus as well as items published more recently. At the time I began compiling the corpus in early 2013, the number of annual publications that qualified according to the search terms listed in Table 3.1 peaked in 2010. In 2015, the number of items that would have qualified relative to the search terms (including items published more recently than 2013) peak at the year 2012. I surmise that the lag between years of peak publication relates to delays in libraries processing and posting electronic references and texts (I will discuss this further in the chapter 7 section on Limitation of Access to Publications). Systemically, I expect that delays in posting may relate to infrastructure (see the narrative of Yolandi Foster's interview regarding South African systems not working like a "recipe").

Chapter Summary

Relative to the interview findings, the findings from the corpus of texts in this chapter have characterized different aspects of the case of mixed methods in South Africa including nomenclature. Based on differing modes of communication between semi-structured interviews and formally published texts, I expected this would be the case. My impression is that the interview narratives represent the heart of mixed methods and broader methodological contexts in South Africa. Consistent with indications from

Brendon Barnes' interview, the corpus of written texts reflects voices and influences of the global north on publication. I talk more about these findings in the final discussion chapter.

CHAPTER 7: DISCUSSION

In this closing chapter, I start by intertwining findings from interviews and the corpus of texts to provide themes regarding the case of South African mixed methods research within each research sub-question I posed in the introductory chapter. From there, I return to the study's central question: What hidden aspects of culture shape the use of mixed methods research in South Africa? Thereafter I provide assertions, revisit philosophical connections, and address challenges and limitations. To end the chapter, I discuss future analysis and studies, provide recommendations for ways in which future studies may draw from practices in South Africa, and offer a conclusion.

Thematic Responses to Research Sub-Questions

The central question of this study, posed in the introductory chapter, asked: *What hidden aspects of culture shape the use of mixed methods research in South Africa?* I will address this question after I address the sub-questions. I now restate the five sub-questions I stated in the introductory chapter and discuss each sub-question's findings thematically.

1. What is the General Nature of Social Research in Contemporary South Africa?

South African social research relates to themes of methodology as a *means to an end, contextualized by messy realities, collaboratively-centered, communicatively embedded, and in need of relational ethics*. To answer this question, I supplement the corpus of texts and interviews with broader South African methodological literature.

A means to an end. Among the interviews, Brendon Barnes articulated that research methodologies in South Africa serve or need to serve as a means to an applied end. At the same time, Brendon Barnes and Xoliswa Mtose both indicated that

contemporary students learning about research methods fail to recognize an end purpose, due to the influence of technology on learning methods. Methodologies and their applications are theoretically situated, as Brendon Barnes promoted when he emphasized contextualizing rather than decontextualizing methods relative to their contexts, not separating methods from ontology, and when he asked where southern researchers should publish applied theoretical aspects of methodologies. I reflect that this theoretical emphasis harkens to approaches to qualitative research in European traditions. Similarly, Amanda Gouws promoted theoretically informing methodology by accommodating the *context of discovery* (including research question) when determining the *context of justification* (methods).

Although the corpus of texts did not directly refer to research as a means to an end, the texts clearly pointed to the philosophical nature and theoretical grounding of research in South Africa. Outside the corpus of texts, Mouton and Muller (1997) provided a strong discussion of *Knowledge, Method and the Public Good* in a way they describe as post-modern. Within the corpus of texts, Mouton (1988, 1996) discussed philosophical and theoretical thought in more applied ways. The 1988 volume included an early section on *The Scientific Language Game* (p. 3) and provided several self-explanatory diagrams to illustrate such topics as the research domain of social reality. Somewhat surprisingly, given the title of their 2013 monograph (*Fundamentals of Social Research Methods: An African Perspective*) Bless, Higson-Smith, and Sithole posited that traditional African knowledge is too mystical to be scientific. They also problematized *the intuitive method* (p. 2), which seems to counter Amanda Gouws' implied philosophical stance that feelings should be kept intact and sensitively inform the

process of “walking in participants’ shoes” when going into the field. Although I did not directly ask interview participants about philosophical or theoretical orientations through the interview protocol, Amanda clearly discussed theory from a feminist standpoint perspective. Brendon Barnes also implicitly addressed philosophical and theoretical orientations when he described the political nature of research.

Contextualized by messy realities. Research in contemporary South Africa is contextualized by messy, blurred, and contradictory realities (Subreenduth, 2006), notwithstanding the apparent straightforwardness of applied and evaluative categories. For example, insider or outsider nature in a specific context is non-binary (Wieder, 2004) with messy relationships between human and economic mobility, rurality, and peri-urbanicity, resulting in part from former township and homeland structures (Neves & du Toit, 2013). Yolandi Foster’s metaphor for this messiness was that South Africa does not allow researchers to *take a recipe and make a cake*. Hence research design and implementation cannot be one-size-fits all and researchers must approach research questions flexibly.

Collaboratively-centered. Broadly speaking, South African research is implemented through collaborative approaches between inquirers and participants, as exemplified through a large series of collaborative studies and interventions started with the qualitative participatory action research and intervention assessment of Ferreira’s (2006) doctoral thesis. This thesis suggested that instead of deeming *experts* to serve as informants regarding a particular phenomenon, researchers allow those whom a phenomenon directly affects to serve as informants. Especially in action research, study facilitators (researchers) need to encourage community participants “to think for

themselves [and] contribute to their own learning rather than receiv[ing] information from” the co-researchers (p. 24). Collaboration addresses the reality that Barnes (2010) described as two perceived studies comprising one intended study in that every study inherently involves both the study the researcher planned, and the study participants perceive and hence participate in.

Collaborative actions in South African research may give voice, identify the location of power, hire community members to do fieldwork, walk together along a transection of a community to locate secondary participants or sites (Amanda Gouws and du Toit, 2010), and include participants as co-authors (Yolandi Foster). Missing from the South African (and global) scene is collaboration with participants in implementing quantitative studies such as designing data collection instruments. Yolandi Foster wholeheartedly agreed with my suggestion that participatory researchers move in this direction.

L. C. Theron (2013) illustrated the role of a community advisory panel in cogenerating locally relevant knowledge and ascertaining context-specific definition of constructs such as resilience. Community involvement contributed to research agendas and co-selection of culturally responsive research processes to the point of indicating how well they expected youth would deal with a mixed methods design and determining that reporting should take place through “breaking bread” rather than providing paper reports.

Communicatively-embedded. “A whole bunch of interactions and motives” influence how people answer questions (Brendon Barnes). Even educated people (e.g. teachers) may lack the sort of literacy that completing a survey takes, involving much more time to complete the survey and a corresponding but unidentifiable loss in

“interested honest responses,” Amanda Gouws said. “Cultural ways of humility” also affects response processes and the extent to which probing is appropriate (Xoliswa Mtose). Methods that fail to capture participant meanings appropriately (i.e., “fraudulent” methods) and the terminology of questions may impinge on and constrain the ways in which people respond. Because incentives impact answers, researchers may do well not to tell participants in advance if they will receive an incentive (Amanda Gouws).

The ways people express attitudes vary according to contexts and purposes, requiring analysts to consider contexts when interpreting opinions. This parallels James Gee’s (2014b) theory of proactive (inquirer) and recipient (participant) design. Barnes, Palmary, and Durrheim (2001) asserted that analyzing the function of language and its contexts is imperative in considering expressions of race, a topic important to South Africa’s history of big-*D* discourse.

Moving from broader discourse to more applied aspects of research, my interview participants discussed low levels of education and literacy among their participants in rural areas, a characteristic that may also be true of participants in areas of peri-urban sprawl (e.g., Orkin, Boyes, Cluver, & Zhang, 2014). However, literacies are multiple and vary by purpose and context. For example, people may be considered or view themselves as illiterate and yet be “cell phone literate” (Velghe, 2014, p. 111). Research-related literacy in particular requires awareness of assumptions made by researchers (Arzubiaga, Artiles, & King, 2008). These points, along with Yolandi Foster’s portrayal of the challenge of questionnaires, may imply that literacy levels for research instruments with pre-defined response categories are lower in South Africa than in the west.

Communication in South Africa also requires considering the *stewed* nature of languages (Reinert, 2015). Because concepts and phrases may not exist or are completely different across languages and culture (Wehipeihana, Davidson, McKegg, & Shanker, 2010), processes of translation and back-translation are “just chaos” (Yolandi Foster). Amanda Gouws did promote back-translation for which she used a team-based approach to communicate between English and seven other languages (see Harkness, Villar, & Edwards, 2010). As Yolandi Foster asserted, team translation is expensive, a point that I suggest research teams consider in determining the number and scope of studies they undertake.

In need of relational ethics. Just as the essence of being African is relational (Ndubuisi, 2013), so must the inherently *interactional* nature of research and data collection be fully acknowledged in South African contexts. Researchers cannot just ask questions and “extract the truth” (Brendon Barnes). “An enormous amount of research” is needed into the reality that “a whole bunch of interactions and motives dance around” ways in which questions are answered, Brendon continued. When South African researchers are not principal investigators (often the case among externally-funded studies), they serve as cultural brokers who interpret the context for funders or principal investigators in contexts of applied studies. By extension, South African researchers serve as brokers between funders, principal investigators, and participant communities all of whom may have differing interests and desires.

The central theme of research in South Africa is that participants need time to talk and tell stories (Yolandi Foster). That research relationships require “a really close relationship of trust is even more important than knowing you need to get informed

consent,” Yolandi continued. Researchers first need to get to know and build trust with participants through as many visits as necessary (e.g., by getting a life story) before “administering” consent and interacting for the purpose of addressing research questions. Therefore, informed consent is not “the ultimate first step.” Ethical research implies establishing relationship by interacting with people so they can “to know what they are busy with and what they are giving and what they can expect.” This may require a couple of informal encounters to establish trust. Yolandi approaches participants as if to say, “You are the experts; you've got the answers. We here to learn.”

Beyond Yolandi’s discussion of interaction, *informality* may be more meaningful than *formality* in developing an ethic of trust (Kelleher, 2014). Researchers may select sites across a range of formality levels, especially given the range of geographic and racial backgrounds, as did Lawhon, Herrick, and Daya (2014) in a recent mixed methods study. Life history approaches and participatory approaches also involve less formal approaches to collecting data.

On a more formal note, five points arose from my interview participants regarding ethical clearance in South African contexts:

- i. No matter how clearly consent is worded and articulated, participants have very high and unrealistic expectations of what research will accomplish (Brendon Barnes).
- ii. Participants with great need may be “over-willing to participate” (Brendon Barnes).
- iii. Review boards may need to consider the volume of research they allow researchers to collectively conduct in a particular place without effect, as with

Johannesburg's suburb and former township of Alexandra where Brendon Barnes and other inquirers have each conducted several studies.

- iv. Based on cultural context, participants may interpret *comfort* and *discomfort* differently than intended, applying such terms as an excuse for changing their minds (Amanda Gouws). Many participants may then terminate a study early, not because they are uncomfortable but to show they have the power to exercise that right. I suggest this may relate to Yolandi Foster's connection of storytelling with oppression and the idea of not being heard.
- v. Participants in South Africa may feel offended and violated when institutional approaches to ethics require anonymity. Yolandi Foster found participants angry with investigators for blurring their faces and omitting their real names from an article written through a participatory process. The research team subsequently changed consent forms to give participants a choice of having their faces and names shown.

2. How Do South African Researchers Define Mixed Methods?

South African researchers define mixed methods according to themes of *qualitative and quantitative knowing*, *dropping mixed and combined nomenclature*, *directly defining mixed methods*, and *advantaging and disadvantaging mixed methods*.

By qualitative and quantitative knowing. In an early discussion of qualitative and quantitative perspectives in South Africa, Mouton and Marais (1988) posed that distinctions between quantitative and qualitative approaches relate more to beliefs about ways of knowing than to forms of data; Brendon Barnes also articulated this. Mouton (1996) ascribes a researcher's preference for approach to their training. Qualitative

approaches are more philosophical, whereas quantitative approaches follow a more positivist inclination. Quantitative approaches are more formalized and controlled. Quantitative approaches need not involve numbers. For example, *more* and *less* convey a quantitative essence in that they imply rank (Mouton & Marais, 1988, p. 155).

In contemporary South African research, I observe a qualitative inclination toward discursivity. As Yolandi Foster described qualitative approaches, they are inductive or deep, and allow people to talk and tell stories. Among mixed methods researchers who are more well seasoned, Amanda Gouws and Yolandi Foster described quantitative research as concrete, involving statistics, confirming or disconfirming, or a involving relationship (assumedly between variables). On the whole, I observe a lack of clarity concerning quantitative-related terms such as *surveys*. The term is used at times in reference to quantitative designs (in a similar category as structural equation models according to Petros', 2010 thesis) and at times as a mixed methods tool (e.g. Andries Gouws', 2012 thesis). This lack of specificity is consistent with a general tendency in any domain to apply terms with broader meaning than in northern contexts.

Brendon Barnes harked to Mouton's (1996) position that training influences researcher preference for qualitative or quantitative approaches by stressing their similarities. He contended that disciplinary and methodological identity forms preference for approach in relationship to communities of scholars; symbiotically, he contends that preference for methodological approach influences how researchers view their discipline.

By dropping *mixed* and *combined* nomenclature. South African mixed methods researchers drop forms of nomenclature "like names," Zoliswa Mtose said. Expressions alternative to *mixed methods* came mostly from the corpus of texts and discussions of the

literal term from the interviews. Particularly in older corpus items, South African authors referred to *combining* rather than *mixing* methods or approaches as exemplified by Peltzer and Phaswana (1999), Muller (2000), and De Wet, Mathee, and Barnes (2001) among applied and Maree and Morgan (2012) among methodological journal articles. Similarly, Bayaga and Moyo (2009) referred to a *combined-methods design* (p. 60).

Use of the word *combined* in earlier mixed methods publications is consistent with my observation that corpus articles used mixed methods terms in more general ways earlier on, and in more specific and globally northern ways in recent years. Brendon Barnes whose interview and publications I have cited numerous times exemplified this pattern. In Barnes, Mathee, Shafritz, Krieger, Favin, et al. (2004), he detailed qualitative and quantitative data sources and analysis without reference to combining or mixed. In Barnes (2010) from the same program, he specified the article's qualitative phase as arising from "a quantitative quasi-experimental study" as part of a mixed methods design (p. 359). Most specifically, in Barnes (2012) he reviewed South African mixed methods publications in the field of psychology including omission of mixed methods nomenclature from South African mixed methods studies and clarifying that absence of nomenclature need not mean that a study is flawed.

In specialized rather than vernacular references, *mixed methods* referred to combining qualitative and quantitative data within in a study. In specialized or vernacular references, *mixed methods* referred to a single thread of data collected in ways neither fully qualitative nor fully quantitative, as in the case of a survey instrument with both open and closed ended questions. In discussions based on vernacular rather than specialized language, *mixed methods* implicitly referred to having the epistemological,

cognitive, and skill inclinations to select qualitative, quantitative, or more specific meanings of *mixed methods* for any particular study. Given that most people in South Africa speak a plethora of languages their use of English differs that of mother tongue speakers of the global north (even among native South African English speakers), the use and assumed meaning of terms such as *mixed methods*, *qualitative*, or *quantitative* may vary widely. See Talmage (2007) about English speakers deriving different meanings from different contexts relative to the role of the interpretation process in meaning-making.

As an example of different meaning implied by the same nomenclature, and relative to not-so-distinct qualitative and quantitative elements as identities (Brendon Barnes), I assert that even the idea of a data *strand* may look more like a bricolage than the linear concept often implied in northern mixed methods literature. For example, although *inquiry* in northern circles often refers to *qualitative* approaches, Posel (2000) used the word *inquiry* to reference the “aura of objectivity” and “‘scientific’ notions of evidence” (p. 121) that South African state institutions portrayed in the early decades of the twentieth century.

Researchers “drop mixed methods” like they drop names without following an integrated approach to the analysis Xoliswa Mtose said. They present and analyze data without showing how they have mixed methods to benefit empirical work, leading to the disadvantage of misusing mixed methods based on lack of understanding. Problems include lack of grounding in mixed methods, and “disintegrating” the discussion of quantitative and qualitative. The biggest problem is seeing quantitative and qualitative

approaches as separate but calling them *mixed*. This leads to a very weak discussion in opposition to the label of mixing.

By directly defining mixed methods. South African researchers directly defined mixed methods in various ways (see Figure 7.1). From the most theoretical perspective, Brendon Barnes described mixed methods research as a political identity of the knowledge economy “amongst communities of scholars.” The most common description of mixed methods research was as “a combination of quantitative and qualitative” approaches or data sets (e.g. Amanda Gouws and Yolandi Foster), often related to triangulation by comparing results or data sets with different purposes (Amanda Gouws). Similarly, in their corpus book section, Delport and Fouché (2011) defined mixed methods as “combining quantitative and qualitative methods in a single study” and I. M. du Toit in her 2010 master’s thesis described mixed methods as “quantitative and qualitative methods in order to gain a better understanding of the research problem than either approach on its own would have achieved” citing Ivankova et al. (2006). From Xoliswa Mtose’s perspective, mixed methods involves putting quantitative and qualitative methods together through a philosophical framework or by mixing data toward the end of analysis.

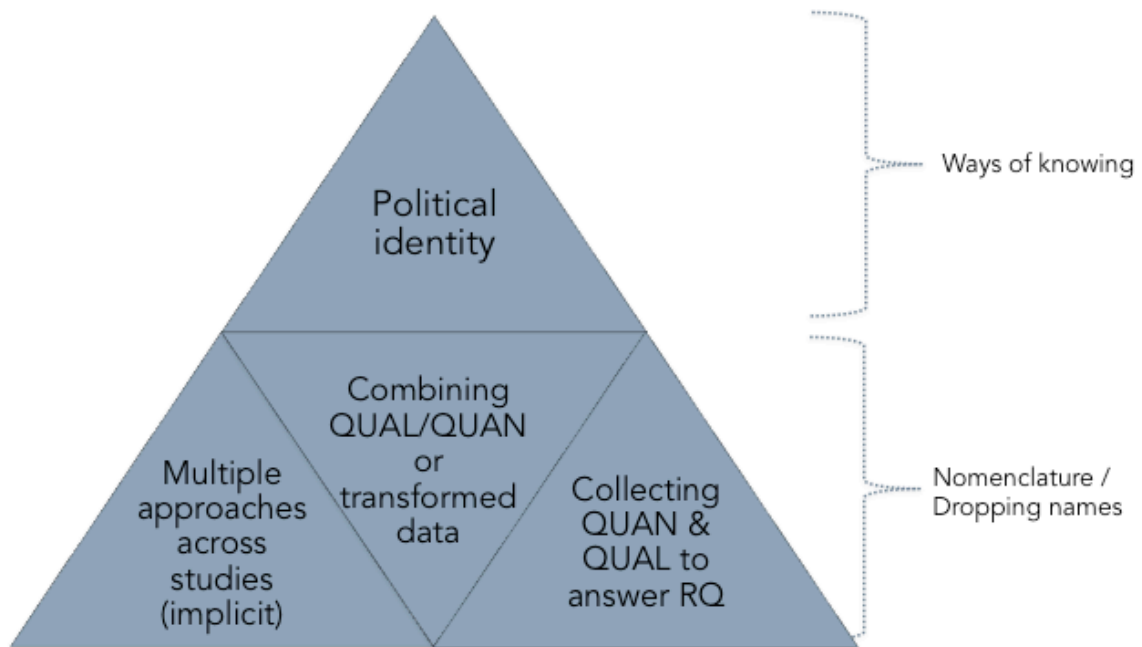


Figure 7.1. Descriptions of Mixed Methods

Going beyond a status-quo definition of mixed methods as involving a combination of *qualitative and quantitative*, Delpont and Fouché (2011) joined the ranks of an occasional but seemingly growing conversation (also including such scholars as Brendon Barnes in his interview and Kyeyune, 2010) calling for more intentional and robust integration. Delpont and Fouché (2011) articulated that mixed methods research “is more than simply collecting both quantitative and qualitative data; it indicates that data will be integrated, related or mixed” at some point in the research process (p. 435). They suggested doing so by reducing, displaying, transforming, correlating, consolidating, comparing, or integrating data.

Expectedly, printed discussions cited other mixed methods authors in their views of mixed methods research. Wagner (2003) cited U.S.-based Tashakkori & Teddlie’s (2003b) definition of mixed methods as collecting qualitative and quantitative data to answer research questions. The following quotation from Bayaga and Moyo (2009)

references an unpublished paper by authors who affiliate with institutions in Botswana and South Africa and gives a flavor of South African rhetoric and historical bibliography: “In view of the metatheoretical assumptions, Brown & Forchheh (2008:5) explain that a combined, mixed-methodology approach ‘facilitates a holistic view and strengthens the internal validity of the design’” (p. 60).

Advantaging and disadvantaging mixed methods. South African researchers view mixed methods with a love-hate relationship. Mixed methods research is seen as both a “white western import” that cannot be directly applied (Amanda Gouws) and as something that solves all problems (Brendon Barnes referred to such views). However, many see mixed methods as *a stranger* due to their anxiety over dealing with numbers and resulting lack of confidence in quantitative ability (Xoliswa Mtose). South African mixed methods researchers both recommend (more often) but sometimes caution against (less often) mixed methods. Brendon Barnes promoted mixed methods widely but not unconditionally. Abrahams (2003) raised a note of caution that promoting mixed methods could increase the myth that problems in evaluation arise from faulty methods rather than from a need to understand mechanisms and assumptions on which intervention programs are based.

The qualitative emphasis of South African mixed methods is its strength. Therefore, the advantages of conducting mixed methods research in South Africa are its potential for meeting everyday reality, addressing highly complex problems in ways that would be difficult to do with a single approach, and being culturally friendly. Contrasting disadvantages of conducting mixed methods in South Africa arise in regard to both lack of academic formation and to misuse. Many South African mixed methods researchers

lack understanding of mixed methods literature. A large portion of South African thesis and dissertation supervisors have not encountered or practiced mixed methods and therefore discourage such designs among their advisees. Forms of misuse involve referring to mixed methods in ways that lack reflection, viewing qualitative and quantitative approaches as separate without attempting to integrate them, and not showing the benefits of integrating them (Xoliswa Mtose). A challenge of conducting mixed methods is that it requires “incredible skill and flexibility” (Brendon Barnes). I expect that the challenges and misuse of mixed methods research in South Africa can be addressed through culturally sensitive approaches to the processes of academic researcher formation and implementation.

3. How Do South African Researchers Implement or Need to Implement Mixed Methods?

South African researchers implement or need to implement mixed methods studies by *choosing contextually appropriate research questions, flexibly designing studies and facing linguistic and literacy challenges.*

Choosing contextually appropriate research questions. Mixed methods researchers in the global south need to avoid “regurgitating” what comes their way from the north, such as by making sure that mixed methods research questions are good politically and ethically for the country or area that a study addresses (Brendon Barnes). Funders who may feel the need to demonstrate that they are “doing good work” make addressing the need for southern voices difficult. In the face of such political and ethical challenges, South African researchers face the challenge of promoting research questions that are relevant for and serve the greater good of the contexts involved.

Flexibly designing studies. The design of South African research in turn needs to respond to the research questions(s), whether qualitative, quantitative, or mixed methods (Yolandi Foster and Amanda Gouws). Once a researcher has determined that mixed methods is a suitable approach, the research question also needs to drive the particular mixed methods design. Mixed methods research questions need to determine sequence vs. simultaneity of designs (Yolandi Foster). The messiness of the South African research context requires researchers to be fluid and dynamic in allowing research questions themselves to evolve in the field. South African researchers need to bring in things they “stumble across” in the field, Yolandi said. Researchers need to “unpack” their research questions rather than expecting respondents to answer research question directly, as Xoliswa Mtose pointed out.

Relative to specific mixed methods designs, I quote Bayaga and Moyo (2009) at length for a flavor of South African mixed methods rhetoric:

Creswell (2007) developed a dominant- less-dominant framework for carrying out research using the mixed paradigm; this framework served as a guide to the study. Brown & Forchheh (2008:5) supported this kind of model; the ‘dominant phase’ in this study was the quantitative one, for the research was built around testing the relationships between variables influencing risk awareness (cf. research questions). The qualitative section was done as a follow-up to solicit clarification on the results of the quantitative (p. 60).

Although I have not located Brown and Forchheh (2008), a published version (Brown & Forchheh, 2009) states that, “Creswell (in de Vos 1998:360), developed a dominant-less-dominant framework for carrying out research using the mixed paradigm.” In fact,

Creswell and Plano Clark (2007) cited Tashakkori and Teddlie (1998) in relationship to a dominant-less dominant design. I believe this type of misquotation on the part of Bayaga and Moyo (2009) relates to difficulty accessing northern publications and particularly books in South Africa.

Relative to mixed methods designs that Creswell (2014) sets forth, the most commonly implied in South African studies is explanatory sequential (e.g. Hinckley, Ferreira, & Maree, 2007 with quantitative dominance; and Barnes, 2010 with qualitative dominance) in which a qualitative phase follows a quantitative phase. In general, the priority in South African mixed methods studies varies according to discipline but leans more toward qualitative than quantitative approaches. The reason for leaning toward qualitative dominance relates to levels of literacy and the challenges of language. In relationship to this qualitative priority, my participants pointed out that researchers need to guard against the impression of quantitative objectivity that encourages separating “what you think [from] what you feel” and to remember not to leave their feelings “outside the door” (Amanda Gouws).

Facing linguistic and literacy challenges. On numerous occasions, interview participants mentioned language concerns. Northern mixed methods fails to serve the needs of South African participants by not accounting for linguistic realities, existing nature of literacies, and lack of familiarity with questionnaires among participants (Yolandi Foster). In her work with HIV infected mothers and with teachers of students whose parents have died of AIDS, Yolandi Foster described that language and literacy issues resulted in participants struggling to answer standardized questionnaires and rating scales, leading to South African researchers relying more heavily on qualitative than

quantitative approaches. The process of completing questionnaires is extremely exhausting for participants and may relate to the nature of education as well as lack of historical experience with books and questionnaires in school and daily life. Today's teachers (participants in Yolandi's long-term series of studies) include those who were raised during apartheid and did not encounter questionnaires or the need to fill them in (see Paxton, 2007 concerning the interim and fluctuating nature of university-level literacies and discourses).³⁷ Because the task of administering questionnaires is so daunting, Yolandi's participants and research team take a break of ten minutes after two or three pages. Allowing people in South Africa to talk and tell stories may help counter the issues with standardized inquiry such as questionnaires often entail.

A mixed methods study from a broader African context provides a relevant example for processing linguistic issues in a particular setting. In a Ghanaian study, Tsikata and Darkwah (2014) focused on methodological issues of combining a survey of 600 women with 12 sets of three-generational of life story interviews. Their major challenge was finding words or phrases that related to empowerment across five languages. For everyday terms, the researchers solicited help from local survey personnel rather than from linguistic experts. The Ghanaian researchers found their original word choices lacked specificity for participant understanding and had to change the wording

³⁷ I expect that hidden effects of apartheid curriculum (designed to domesticate and indoctrinate) will take years to disband given the position of schools at the intersection of desire and reality and the challenge of preparing teachers to deal with this (see Msila, 2007).

after the start of the field period. For example, after selecting the Gonja term *abol* for *power* (directly related to the central phenomenon), they later realized the term could mean *a sweet voice* and that participants interpreted *abol* as *liking sweet things* without perceiving a connotation of *empowering voice*. This example reinforces the need for deep sensitivity to implied meanings of language in research contexts.

Although there are no panaceas for responding to linguistic and literacy concerns in South African research, awareness of those concerns may generate relevant creativity in dealing with them. Exemplifying creativity, participatory approaches and (beyond the corpus of texts) the Mmogo-MethodTM that provides beads, clay, and grass sticks for participants to visually project stories, feelings, and experiences are helpful (Kahl, 2010). Figure 7.2 (photograph provided by Vera Roos through personal communication) shows these materials and Figure 7.3 shows an example projection. Although no items in the corpus used the Mmogo-MethodTM in a mixed methods study, Liebenberg and Theron (2015) did so in a more recent chapter.



Figure 7.2. Mmogo-MethodTM Materials



Figure 7.3 *Visual Representation of an Empty Container and the Despair of an Older Person* (reproduced from Figure 18.1 of Roos, Chigeza, & van Niekerk, 2013, p. 381, with publisher permission)

4. What Sources of Cultural Knowledge Influence South African Mixed Methods Research?

The sources of cultural knowledge influencing South African mixed methods research include *South African knowing, formation of South African mixed methodologists, globally northern knowing, and not subscribing to separate cultural influences.*

South African knowing. Research in South Africa honors participants' ways of being and knowing through a "tradition of not rushing participants," and of honoring participants' worlds at large (Ferreira, 2006, p. 124). In southern African life and research, relationships are more important than participatory approaches themselves (Romm, 2015).

Viewing participants as "experts who hold the key to understanding and insight" acknowledges a form of embedded knowledge (Ferreira, 2006, p. 22). Interpretive approaches to social research view participants' subjective experiences as real, take these

subjectivities seriously, and interact by listening carefully to what participants have to say (Terre Blanche & Kelly, 1999). Instead of translating everyday experiences into variables, interpretive approaches seek the “power of ordinary language and expression” to understand the social world (p. 123). Terre Blanche and Kelly (1999) assert that people who do not consider themselves social researchers have done some of the best interpretive work. These people include Antjie Krog (1996, 2000, 2010) and her depiction of how the word *truth* trips her tongue; and Steve Biko (1978), who reflected on his experience interpreting the larger context of the system in which he was raised. Such people may be considered informal researchers.

Formation of South African mixed methodologists. Methodological formation requires building on research literacies and conceptualizations to which students already relate through simple terms and a humble tone with the former leading to the latter, as Xoliswa Mtose implied. Because implementing mixed methods requires fluency in both quantitative and qualitative approaches, sources of training in quantitative and qualitative approaches are important in addition to the source of mixed methods training. Implementing quantitative approaches requires a particular type of numeric literacy. Exposure to mathematical literacies among black South African students during apartheid or post-apartheid years has lacked relevance to their nature of mathematical conceptualization and the influence of language on that conceptual discourse (see Feza-Piyose, 2012 regarding the crisis of mathematical education among African children in South Africa). Numeracy and literacy also effect the level of material that can be presented to students in methodology courses (Wagner, 2003). Methodological fluency

and conceptualization may then, in part, explain the low number of mixed methods theses from historically black and coloured institutions.

South African communities of scholars have become aware of mixed methods for multiple reasons. The first reason arises when a study inherently points to the need for both qualitative and quantitative leaning approaches, as in the experiences of Amanda Gouws and Yolandi Foster. Many researchers in this situation have thought about or combined approaches before reading or hearing the term *mixed methods*. The second reason comes from researchers formally studying mixed methods in South Africa, the United States, or the United Kingdom, as in the experiences of Xoliswa Mtose and Brendon Barnes. In the case of Xoliswa Mtose, she studied about mixed methods in South Africa and then at Harvard, but not until she encountered a need within her dissertation study was she motivated to consider using the approach.

Based on my interviews and on the academic genealogy of graduate theses, formal mixed methods awareness in South Africa seems to flow in two clusters. The first cluster originated with Martin Terre Blanche at the University of South Africa, flowed through Kevin Durrheim at the University of KwaZulu-Natal, and most recently has flowed to Brendon Barnes and Xoliswa Mtose (two of my participants). The second cluster originated with Linda Richter, Johann Mouton, and Kobus Maree, flowed through Amanda Gouws (one of my participants), Liesel Ebersöhn, Irma Eloff, and Patrick Ngulube, then flowed through Yolandi Foster (pseudonym for one of my participants) and Cycil Hartell, and most recently has flowed to Angelique Wildschut, Querida Saal, Ngoni Moyo, Priscilla Murugan, William Louw, and Ngoako Marutha.

Globally northern knowing. By *globally northern knowing*, I refer to ways of knowing that relate to Eurocentric thought, among researchers whose institutions are geographically situated either in the global north or in South Africa. Brendon Barnes clearly articulated the political nature of qualitative, quantitative, and mixed methods approaches. Notably, methods, books, journals, and conferences are big business. Funding moves authors to claim methodological innovation (Wiles, Crow, & Pain, 2011). Funding organizations determine what methodology is implemented, how results are disseminated, and who publishes.

Northern journals influence southern methods and mixed methods by excessively emphasizing and expecting methods to be decontextualized from context. In spite of the fact that many people from the African continent do mixed methods, Brendon Barnes says that globally northern publications include “very, very, very few voices” from the global south (Africa and South America). People from the global south need to “add a voice to the methods literature rather than regurgitating what comes their way.” They serve as mixed methods consultants but are not allowed to say how mixed methods should be conducted.

Not subscribing to separate cultural influences. One clear voice among my participants emphasized that origins of cultural knowledge cannot be distinguished because we cannot construct people. In this view, the gaze of the “colonizing perspective” is gone such that worlds transcend in a “hybrid space” (Xoliswa Mtose). Especially at an academic level, Xoliswa said that people in the United States no longer think the world revolves around them, and no longer distinguish *us* from *them*. Northern methodologists may seem more humble than those in South Africa.

In several ways, Xoliswa Mtose emphasized that she did not know how South African and western cultures had influenced the use of mixed methods in South Africa. Her experiences of coming from both worlds make the distinction difficult to make. Notably, Xoliswa frequently uses *I* statements to refer to her relationship with this lack of distinction, which may indicate that she assertively takes ownership to avoid the distinction from affecting the studies in which she participates. As my chapter 6 discourse analysis of her informed consent segment shows, Xoliswa may be the agent in her own culturally sensitive work on behalf of U.S. researchers.

Overall, social science requires recontextualizing, or returning texts to the context in which they were intended. Although we, as researchers, will never know the details of a speaker's context, we can empathically try to imagine those contexts. To communicate these contexts in findings and interpretation, researchers need to use context-based categories and terms, including immediate as well as historical or critical contexts of participants. With researcher as instrument, the most important contribution of qualitative methodology is in understanding these contexts.

5. How Could South African Cultural Knowledge Further Contribute to Mixed Methods Research?

South African cultural knowledge is *currently contributing* and *may contribute in the future* to mixed methods research.

Currently contributing. South African researchers conduct mixed methods research in a most culturally complex environment. They realize that manipulating variables in experiments do not account for such overarching contexts as the apartheid story and that complexity requires sensitivity to successfully navigate studies. Given the

prominence of storytelling not only as a form of communication, but also a communal vehicle for developing a shared understanding, their mixed methods work tends to be qualitatively dominant. South African researchers often engage in informal encounters with participants, building relationships and gaining initial insights, prior to soliciting their formal consent and commencing the work of gathering study-related information. South African mixed methods researchers allow their participants to truly participate in their studies by engaging them in workshops and fun activities as part of the data collection process. They are comfortable allowing participants to be discursive, even though it may be more difficult to analyze the data they gather. In addition to understanding cognitively what they are doing, they allow themselves to be guided by their feelings in order to put themselves in their participants' metaphorical shoes. In practice, mixed methods research in South Africa is enmeshed in its myriad of intertwined cultures and the lives of participants, which contributes to a depth of understanding and hence to meaning and validity of findings (See Tattersall, 2015 concerning the inherent nature of relationality in meaning).

May contribute in the future. South African researchers collaborate through most aspects of the research cycle with the exception of developing instruments and questions to collect structured information. My hope is that future mixed methods research in South Africa will fill this gap, as Yolandi Foster recommended. When I asked whether my participants were familiar with the work of Paul Bolton (e.g. Bolton & Tang, 2002) in developing cross-cultural assessment of function in Rwanda and Uganda, none were but they were interested and asked for references. In keeping with Chishugi Oswald's (the artist) desire to have his work promoted (per email conversation with

Bolton, 2013), I share this vision for the future that I described verbally to my participants. I see the minimally verbal response card as developing from a focus-group based Mmogo-method® activity as part of a sequential exploratory mixed methods design (see Figure 7.4).

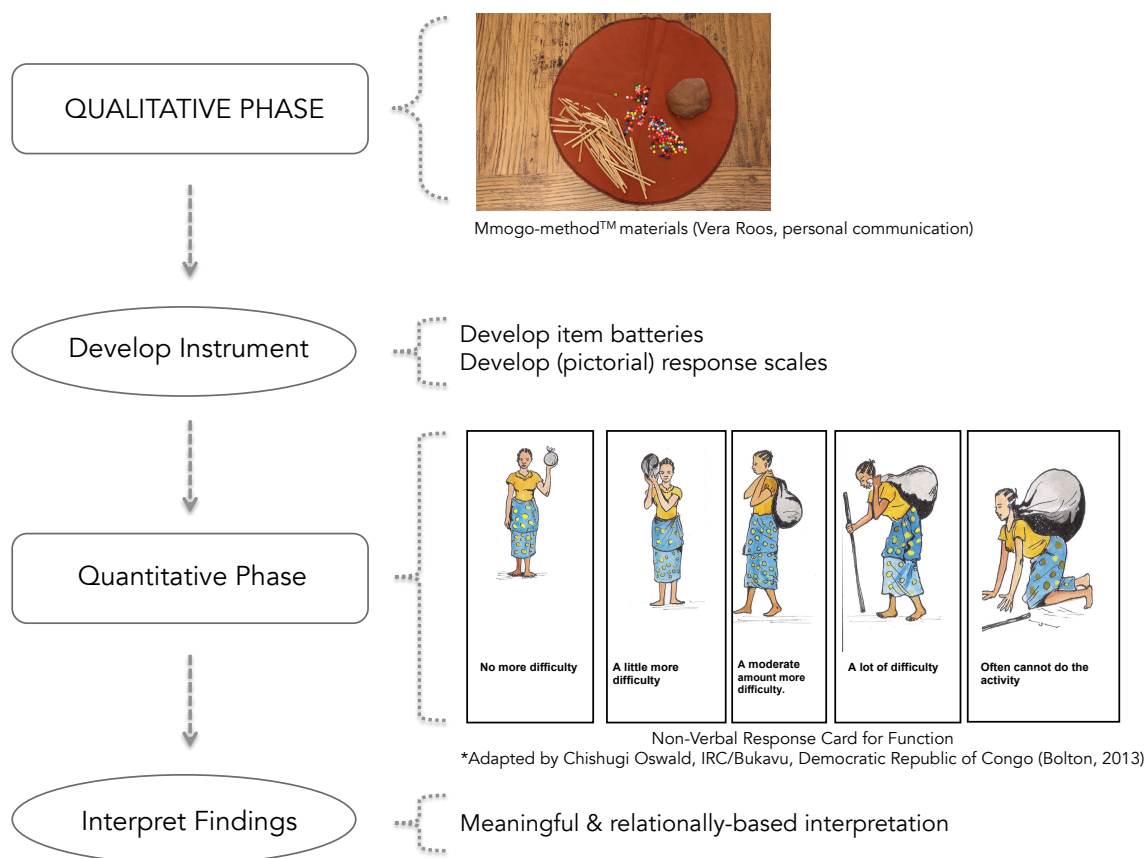


Figure 7.4. Prototype of envisioned future mixed methods instrument design in South Africa³⁸

Response to the Central Question of Tacit Cultural Knowledge

I now turn to the central question framed by the study's theoretical lens: *What hidden aspects of culture shape the use of mixed methods research in South Africa?* To answer this question, I discuss tacit cultural knowledge in South Africa, in the global north, and then bring the sources of knowledge together. Generally speaking, tacit South African knowledge involves intersecting hypercomplexities related to languages and

³⁸ The original black-and-white pencil drawing of the response card in Bolton and Tang (2002) included words only in the Rwandan language of Kinyarwanda. For copyright reasons I show this English version in color instead.

versions, traditionality and contemporaneity, degree and nature of urbanicity, economic disparity, and racial identity. Because literacy is socially situated and not purely cognitive (Gee (2015), I pose that these hypercomplexities inform the nature of literacies in South Africa (see Velghe, 2014 concerning literacies as knowledge). Literacy is not a singular construct in that it is not comprised of a single spoken, written, or reading language level; rather, literacies are multiple, varying by purpose and context (Velghe, 2014). Research participants have different levels and kinds of literacies including people who cannot read and people who are university educated but whose literacies may differ from a western norm (Yolandi Foster & Amanda Gouws). Because literacies are context-based, even research participants with university education may lack forms of literacy required in implementation of research that requires participants to choose from a set of response options rather than allowing them to formulate their own responses (Yolandi Foster). Regardless of literacy level, South African people like to talk (see Allen, 2006 about a singer, Tu Nokwe, who said that “most white people like to tell stories,” p. 61). Storytelling is at the heart of identity and ways of knowing in South Africa (see Mkhize, 2006 concerning storytelling as a cultural connection between individual and society).

In contrast to southern tacit knowledge, northern tacit knowledge involves politically identified methodologies intertwining with knowledge economies in a way that determines which knowledge is considered valid and how knowledge is obtained (see Discourse Analysis Across Interviews in chapter 5). More often than is desirable, these decisions are made or influenced by funders, according to Brendon Barnes (see Figure 7.5 regarding tacit political identities constructing the knowledge economy and, in turn, shaping explicit knowledge). Take Brendon Barnes’ example of a northern funding

organization that wants to teach people to wash their hands as an intervention to prevent the spread of diarrhea. The funding organization wants Brendon to assess the effectiveness with which people wash their hands and in turn prevent the spread of the disease. But if the community lacks sanitation and nutritional adequacy, the funding organization has spent “an enormous amount of money” to implement and evaluate an intervention irrelevant for the community involved. In this case, the research question entertained by the northern organization was inappropriate because it assumed personal and collective community fault rather than recognizing underlying issues of infrastructural beyond individual or community-level control. Perhaps if the funding organization had appointed a South African researcher as the principal investigator, instead of a northern-based staff member, they could have avoided funding a study that implied “people living in poverty are responsible or to blame for their circumstances.” By trusting and honoring knowledge of a South African principal investigator, a research question more relevant for the community would have evolved. In turn, the organization could have more wisely invested funds toward infrastructure that would have made meaningful difference in furthering their agenda to prevent the spread of diarrhea.



Figure 7.5. Political Identity of the Tacit-to-Explicit Knowledge Economy

Attempts to study South African contexts need to consider storytelling literacies relative to the rhetoric of research administration and implementation. Honoring multiple forms of literacy and ways of knowing will go a long way in ensuring that participant meanings approach researcher meanings and that Hawthorne Effects are minimized. Bringing together South African and northern tacit knowledge brings storytelling identities face-to-face with expectations to complete questionnaires. These differing expectations mean that mixed methods studies take longer, for individual participants and on the whole, than researchers accustomed to completing instruments would expect. Differing identities and differing literacies affect implementation of both qualitative and quantitative approaches. Qualitative approaches are affected in that lengthier responses take longer to transcribe, process, and analyze. As Yolandi Foster pointed out, quantitative approaches are affected because the cognitive process of answering questions and filling out forms is “a daunting task” that is significantly more cognitively challenging and takes correspondingly longer than in northern contexts. Although

Yolandi Foster portrayed challenges with written questionnaires, I expect that interviewer-administered questionnaires would be as daunting because the thought process behind answering structured questions is highly demanding, in addition to the process of filling out instruments (see Trimbur, 2013 regarding the relationship between types of literacy and the rhetoric of filling out forms in South Africa). Given that forms of literacy accessible to South African participants are more conducive to qualitative than quantitative research and that South African mixed methods studies tend to be qualitatively dominant, researchers conducting mixed methods in South Africa need to thoughtfully approach a study's quantitative strand by considering the nature of numerical literacy among participants. The section on Recommendations for Participant-Centered Research will address specific ways of honoring participant literacies but meanwhile I continue with assertions, challenges and limitations, and future analysis and studies.

Assertions

Given their tacit nature in the texts and my role in making them explicit, four implicit themes rise to the level of assertions based on a combination of my own experience, scholarship, and assertions of my information sources (Stake, 1995). I view these assertions as *petite generalizations* concerning the case itself and will return to *grand generalizations* in the recommendation section. The strongest assertion relative to evidence is that *meaning is validity*. By way of two other assertions, *methodological generality and specialty intertwine* and *data sources reflect southern and northern trends*.

Meaning Is Validity

I intentionally avoided asking interview participants about *validity* to avoid prompting conversation based on preconceived meaning (note Carspecken's (1996) position that reconstructing meaning serves as groundwork for reconstructing validity). Instead, I asked how they *attempt to capture participant meanings*. The idea of meaning, and hence seemingly validity, was present at many turns of the interview conversations. The emphasis on talk, on allowing participants to tell stories, on informal encounters, and on taking time to get to know participants (as many visits as it takes prior to consent, Yolandi Foster emphasized) all point to the perceived importance of meaning-making. Yolandi emphasized the importance of qualitative approaches in providing deep understanding, in getting at participants' perceptions and the *personal meanings* they attach to an idea. Furthermore, she described constant member checking and continuous *monitoring and evaluation visits* explicitly for the purpose of verifying that the meanings her team had captured were what participants intended them to hear. Yolandi also said that she uses participants' words as evidence when she writes up findings. She described her participants as *very open*, partly due to African culture and said that, *if they relax in your presence*, they are willing to share their views and say when they don't agree. That willingness is based on a *really close relationship of trust* that follows the team initially telling participants that, "You're the experts; you've got the answers. We here to learn." Setting the stage by empowering participants results in them being honest about member checking.

Amanda Gouws emphasized the need for translation and back-translation (referring to a situation in which she involved team translation in and out of seven

languages!) to prevent *loss of meaning* and to assess validity. Amanda also emphasized the need for rigorous coding and categories both in regard to capturing meaning and in regard to validity when consistency across interviews is needed. For theoretical points not to be interpreted across interviews, *the meaning of the interview speaks for itself*.

Amanda continued by saying that quantitative approaches make listening across cultures, or listening for something different than the researcher expects, difficult. When a researcher asks *the old Likert scale*, they have no understanding of why a participant answers the way they do because such response categories involve an unnatural way of thinking.

Xoliswa Mtose affiliated validity and reliability with quantifying that allows numbers to check and balance. She perceived *qualitative* as eliciting experiences and spoken words from which researchers make meaning. She also cautioned against interpreting pauses and body language as meaningful other than representing thought processes across languages or cultures; interpreting otherwise can *impinge* on analysis of the data and lead to misinformation. When I asked about the benefits of mixed methods, Xoliswa asserted that leaving quantitative and qualitative *disintegrated* is problematic. She also cautioned against leaning only on *reliability* or *credibility* alone. She seemed to imply that quantitative aspects of mixed methods studies need to address reliability whereas qualitative aspects need to address Lincoln's five aspects of rigor and trustworthiness, I assume referring to Lincoln and Guba (1985) discussion of *credibility*, *transferability*, *dependability*, and *confirmability* as ways of operationalizing *trustworthiness*. From the corpus, I.-M. du Toit (2010) also mentioned Guba's four criteria of *credibility*, *transferability*, *dependability*, and *confirmability* for which she

referenced Shenton (2004) and Krefting (1991), both of whom referred to Lincoln and Guba (1985).

Brendon Barnes emphasized the need for appropriate research questions—and what could be more foundational to meaningful validity than the right research question, I ask. In response to my inquiry, Brendon posed that the influence of northern principal investigators (PIs) on South African research relates to *who gets to publish* and *how that work gets disseminated*. Therefore, I extend that northern PIs determine *what gets published or disseminated* and which findings are deemed important. Brendon indicated that studies for which northern researchers serve as PIs tacitly necessitate South African researchers serving as cultural brokers or interpreters. I suggest that perhaps this creates an additional layer of possible miscommunication beyond what might be the case if a South African researcher were PI and hence were allowed to carry more responsibility with less need to defend or explain their perceptions. Interestingly, when I asked Brendon *how South African researchers attempt to capture participant meanings when they used mixed methods*, he responded that this varies considerably across researchers and implied that mixed methods lacks sufficient national prevalence to describe trends concerning meaning-making. On the whole, however, I view Brendon and the other interview participants as tacitly confirming my original thought that meaning operationalizes validity.

Methodological Generality and Specialty Intertwine

The assertion that methodological generality and specialty intertwine has two manifestations: that *mixed methods in particular is inseparable from methodology in general* and that *general methodological specialists provide benefit*.

Mixed methods in particular is inseparable from methodology in general.

South African qualitative approaches are simultaneously strong in both participatory and visual forms of data collection (e.g., the *Mmogo-Method*TM described by Roos, 2012 and approaches described by Mitchell, Theron, Smith, & Stuart, 2011 in *Picturing Research: Drawing as Visual Methodology*). Hence, in Figure 7.4 I suggested a prototype of future South African mixed methods that would implement a visual rating scale as part of a *quantitative* phase following a *qualitative* phase of a mixed methods instrument development design. In chapter two, I also described event history calendars as incorporating conversational flexibility and time-oriented cues to collect relatively quantitative data (Belli et al., 2007). In a South African context, Thupayagale-Tshweneagae (2012) applied event history calendars to learn about grief among adolescents who had been orphaned by AIDS (see Figure 7.6, which I share through open access under Creative Commons Attribution License). Thupayagale-Tshweneagae referred to this implementation as *mixed methods* in that the calendars provided both data she referred to as *quantitative* as well as data that she analyzed thematically. Both the visual rating scale and history calendar models exemplify ways in which quantitative data in South Africa may embody a more qualitative-appearing form of data collection than northern researchers may recognize as *quantitative*. From this, I assert that *qualitative* and *quantitative* distinctions may be less clear in meaningful implementations of South African research than has become common in the north. If qualitative and quantitative approaches are less distinct, and if the event history calendar example effects an inability to distinguish separate qualitative and quantitative strands, I posit that perhaps

distinguishing mixed methods from general methods may be more difficult in South African than in northern contexts.

TABLE 2a: A sample of the event history calendar completed by a participant.

| Measurements | Year | | | | | |
|----------------------------|------|-----------------------|--------------------|--------------------------|---------------------------|---|
| | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 |
| Age | 16 | 17 | 18 | 19 | 20 | 21 |
| Goals in life | - | - | - | - | Look after my siblings | Study hard and make my mum proud |
| Family (Tick if live with) | - | Mum, dad and siblings | Dad and siblings | Grandmother and siblings | Grandmother and siblings | Grandmother and siblings |
| Role models | - | Dad | Dad | Dad | Dad | Dad |
| Significant events | - | - | Death of my mother | Death of my father | Inability to go to school | Being sponsored for further studies by a Spar manager |
| Substance use | - | - | - | - | - | - |
| Alcohol | - | - | - | - | - | - |
| Marijuana | - | - | - | - | - | - |
| Others (name) | - | - | - | Sniffed glue | Sniffed glue | - |

Source: Adapted from Martyn (2005)

Figure 7.6. Example of a Completed Event History Calendar Implemented by Thupayagale-Tshweneagae (2012).

General methodological specialists provide benefit. Among the interviews, Brendon Barnes articulated that South African researchers must think like methodological generalists, due to lack of social science researchers, and cautioned against separating technical knowledge from ontology. Xoliswa Mtose's articulation that South African universities need units specializing in methodology tacitly referred more to the portion of academics who consider themselves methodologists as opposed to whether those methodologists are generalists or specialists. The corpus of texts included books from ontological perspectives (e.g. Mouton & Marais, 1988 and Mouton, 1996) and from a disciplinary perspective (Wissing, 2013 on well-being research) but none from a specialist aspect of methodology.

In the United States, academics are highly specialized, more so with each passing day (see Vitter, 2010); for example, academics must now describe themselves as *modal verb specialists* rather than simply as linguists. Roberts (2013) posed that increased

specialization and decreased flexibility among researchers may lead to poorer quality teaching. Increasing specialization of knowledge requires commodifying that knowledge, which in turn leads to marginalizing alternate views (Cole, 2015). To the extent the gap between northern and South African specialization increases, I assert that the gap between commonly used methodologies and their appropriateness for southern contexts will increase. At the same time, I imagine that pressure from South African governing organizations for academic researchers to follow northern practices will remain in effect. Methodological specialists have a narrower repertoire from which to choose, in which case the adage that *when a person has a hammer, everything is a nail* applies in selecting methods.

In addition, I pose that the South African context is so complex that it may do well with a larger portion of methodological generalists or utilitarians who understand layered aspects of societal reality than north environments encourage. The question of what portion of academically trained professionals consider themselves methodologists seems more relevant than the question of what portion of methodologists consider themselves specialists (see Tothill and Crothers, 1997 in Wagner & Maree, 2007 concerning *specialist* referring more to discipline than to research). I assert then that specialists in general methodology provide benefit.

Data Sources Reflect Southern and Northern Trends

Linguistic forms vary according to the formality of contexts (Biber, 1988). In my interviews I intentionally established an informal tone to put participants at ease with saying whatever came to their minds; I attempted to approach the *really close relationship of trust* that Yolandi Foster said allowed her participants to share their views.

The corpus of texts, however, was written implicitly for formal audiences and required citation of published texts rather than personal experience that interview participants were able to share. Additionally, I was able to ask explicit questions of interview participants that I could only ask indirectly of printed texts. Most notoriously and implicitly, I interviewed participants as applied mixed methodologists whereas authors of mixed methods book chapters may have viewed themselves as mixed methodological specialists. For example, in Delport and Fouché's (2011) chapter on *Mixed methods research*, all 113 citations referenced northern-affiliated first authors, possibly indicating that methodological specialist voices (mixed methods as opposed to a broader methodological or disciplinary focus) position themselves in more northern than South African ways. My broad assertion is that the interviews represented South African voices and the corpus on the whole represents more northern voices, with representation varying according to the genre of corpus items and according to relative applied versus methodological orientation.

Philosophical Connections

In this section I reiterate the topic of crystallization and then more broadly revisit my philosophical positioning relative to the dissertation as a whole. My view of life as kaleidoscopic relates to both points and is consistent with the metaphor of a kaleidoscopic mosaic by which I described South Africa's continual transmutation in chapter four and with the crystallization metaphor by which I described my chosen form of transactional validity in chapter three. The multiple genres of data collection (interviews, books, articles, and theses) and analysis (narrative, thematic, and discursive) that I have pursued seem to require a crystal that reflects all angles rather than a triangle

that would seem to require two forms of data to confirm or disconfirm each other. The form of crystallization I have pursued is *integrated* rather than *dendritic* in that I have attempted to bring together multiple genres rather than leaving them separate (Ellingson, 2009). Findings from interviews and the corpus of texts in chapters five and six each serve as a *patched* form of integrated crystallization in that they function autonomously. Within chapter five, discourse analysis across interviews is patched separately from the narrative and thematic analysis, although the thematic analysis is woven into results of the narrative analysis. The forms of analysis in chapter six are *woven* together within each discussion of genre through text external and internal dimensions. Although I attempt to weave together the integrated crystallization in the discussion of the present chapter, I view my efforts across the dissertation as a whole as more patched than woven.

I return now to philosophical aspects of my worldview, of my data sources, and of the meanings of my findings. Among the philosophies depicted in Figure 6.1 *The Research 'Onion'* (Gouws, 2012 recreation of Saunders et al., 2007), my worldview relates to a hybrid form of Afrocentricity that navigates both subjectivity and functional traits (Olaniyan, 1995).³⁹ In the words of Saunders et al. (2007), my *approach* is more inductive than deductive in the sense that induction seeks to understand the meaning people attach to their lives. My *strategy* has involved a case and my *choice* a multi-method (qualitative) study (as opposed to mono method or mixed method) in the sense of multiple data sources and multiple forms of analysis. The *time horizons* of the interview

³⁹ (Olaniyan, 1995) describes the interplay between Eurocentricity and Afrocentricity as resulting in two understandings of genre: “regulative and prescriptive” and “descriptive and functional” (p. 37). The functional/descriptive understanding is culturally bound with a relativist view.

data were cross-sectional and of the corpus of texts were longitudinal (from 1983 through 2013). In addition to collecting interview and corpus data, the specific *techniques and procedures* have involved narrative, thematic, and discursive analysis.

Beyond the *Research 'Onion'* I have found myself advocating for social justice by promoting participant-centered research in both design and implementation. I have taken risks by promoting the need to more truly meet South African participants and researchers where they are at along with the need to throw off our northern researcher thoughts as much as we can. As the recommendations will show, I believe we need to carry this stance beyond South Africa to other parts of the global south (e.g., South America) and the global north where our neighbors often are less like the impressions we have of northern reality than is actually the case.

Challenges and Limitations of the Study

Limitation of Access to Publications

Although I am confident in the richness of my findings, several challenges and limitations have influenced this study. The single biggest challenge in conducting this study was access to African and South African publications, particularly ways of identifying those publications (i.e., lack of a comprehensive sampling frame⁴⁰).

Electronic search tools available through many U.S. university libraries lack the ability to identify and access a full range of materials published outside the global northwest, and purchasing personal access to databases would have been prohibitively expensive. For this reason, I was unable to identify many articles published in African journals or to

⁴⁰ Although I intended to approach a census of the population of mixed methods items in South Africa, I refer to *sampling frame* in the absence of an available *population frame*.

access many theses completed at South African universities. The University of Nebraska-Lincoln's (UNL's) InterLibrary Loan office was highly supportive beyond the call of duty. However, because InterLibrary Loan fees were not subsidized by UNL for all sources, I paid sizeable fees for several dissertations. Many books published on the African continent and in South Africa (e.g., by Van Schaik or Juta) were not available at all due to export tariffs. I identified and purchased all corpus textbooks by perusing shelves of university bookstores while I was in South Africa.

McNabb (2013) gives considerations for evaluating the sufficiency of a sampling frame (see Table 7.1). Although these considerations originated in a survey context, they are relevant for reflecting on the effect of my sampling frames (virtual-frame and bibliographic reference lists).

Table 7.1. Reflection on McNabb's (2013) Considerations for Developing Sampling Frames

| McNabb's Consideration | My Reflection |
|-----------------------------------|---|
| Type of data collected | <ul style="list-style-type: none"> • I expect more impact on corpus of texts than on participants |
| Descriptions of corpus items | <ul style="list-style-type: none"> • My sense is that the participants I selected, based on the corpus items I had gathered as of April 2013, were a reasonable though not ideal representation, based on what my participants said about key methodological figures. Corpus of texts is less representative, particularly among theses from historically black and coloured institutions. |
| Number of frame elements | <ul style="list-style-type: none"> • By intention, the number of texts I found although I suspect I missed possible frame elements |
| How and when the frame is updated | <ul style="list-style-type: none"> • Potentially constantly, making it difficult to determine the number of frame elements |

Concerning corpus design, Biber (1993) suggests that the lack of representativeness is more consequential for text-internal (e.g., applied vs. methodological) than for text-external (e.g., genre) strata. In the case of mixed methods research in South Africa, I expect that external strata have been impacted. Year of

publication is distorted because more recent publications are not available and, as I mentioned regarding theses, likelihood of electronic access seems related to institutional history.

A specific example of lack of sampling frame coverage is reflected in the fact that only three of 37 mixed methods thesis authors in the corpus completed their degree at historically black or coloured institutions. There is no way to know the extent to which the low number of theses from these institutions relates to sampling frame inadequacy because, as I mentioned in regard to academic formation, structural reasons such as mathematical conceptualization and mathematical education may also contribute to the low number of historically black theses. However, the sampling frames of Google Scholar and bibliographic references have likely differed considerably from the population of mixed methods-related items in South Africa. Historically black institutions may have created online repositories later or added items more slowly than other institutions and hence are less likely to have had contents searchable via Google Scholar or other online databases. For historically coloured institutions (the University of the Western Cape, in particular), it appears that theses may have been posted to a university repository since I began my search in early 2013. For example, I did not find Matsika (2009) through Google Scholar in 2013 but I do in 2015.⁴¹ On the whole, the low portion of theses from historically black and coloured institutions is likely influenced by

⁴¹ I have not repeated searches of Google Scholar using the terms listed in Table 3.1 since the end of 2013 but I do continue to follow items about which I learn from other sources such as bibliographies. However, I have not added to the corpus any items I have found since the end of 2014 and have not included items published since 2013 regardless of when or how I have found them.

sampling frame error, the error caused in this case by under-representation of such theses in Google Scholar and citations of existing publications (see McNabb, 2013). For future analysis, I will include library repositories of individual universities as sampling frames. I also expect that in the future, a larger portion of theses will be available online through university repositories. If I were to conduct this study again, I would consider hiring a South African librarian to help me with the search process.

Challenge and Limitation of Travel

One of the challenges I experienced led to a limitation. The financial, temporal, and security concerns of travelling alone as a woman in South Africa limited the number of interviews I conducted. However, mitigating the limitation of conducting only four interviews was the reality that the interviews I conducted were very rich and provided diverse opinions. Furthermore, smaller sample sizes allow a researcher to more clearly delineate a topic (Morse, 1995).

Personal Challenges and Limitations

I encountered four personal challenges and limitations: my own excitement, travel-related illness, translating discourses, and making my tacit knowledge explicit. As a personal limitation, I was excited about talking to researchers in a land of my origin. On one hand, I wish I would have talked less and gleaned more of my participants' thoughts during the interviews. On the other hand, I intentionally allowed participants to speak very broadly relative to research-related topics and sequence came to mind. Collecting and interpreting the interview data relative to encouraging my participants' storytelling and leaning into the English *stew* was challenging for analysis. In recognizing that this would be the case, Xoliswa Mtose both thanked me and wished me luck interpreting her

spoken words. As a child, I was accustomed to stews in daily conversation but not in the context of professional conversation. Pronouns and reference words challenged me; I could have probed further to explicitly clarify referred meanings of phrases for western audiences, but asking all possible questions would have disrupted the interviews and at times have been impolite.

My second personal challenge has involved acute and long-term effects of travel-related illness. Shortly after arriving in South Africa during the summer of 2013, I contracted an acute illness while I prepared for and conducted my interviews. Toward the end of my two-month stay in southern Africa, the acute phase of the illness became chronic. During the following year, while organizing and analyzing data in the United States, I obtained diagnoses and completed harsh treatment. During the second year after data collection and on an ongoing basis, I have dealt with loss of physical function due to the powerful medications. I hope that this challenge has strengthened me in character though not in body.

Inherent to my study has been the challenge of translating the discourse of abstract concepts across sociocultural and linguistic milieus, both within South Africa's high heterogeneity and between South Africa and the global north. Not surprisingly, South Africa's hyper-linguistic and polycultural contexts have extraordinarily compounded the complexities of identifying a single meaning for a construct such as "mixed methods" across discussions in multiple Englishes and languages (Dempster & Reddy, 2007). In working with interview findings, communicating between South African and globally northern Englishes was challenging. Perhaps less intuitive to some readers and more difficult for me has been the thought required to translate constructs

across the great divide of South Africa's realities and ways of thinking and U.S. perceptions of those realities and U.S. ways of thinking.

Much of my knowledge of southern African cultures is tacit. For this dissertation, I have been taxed by the academic rigor of finding sources for the cultural knowledge. I thrive on reading and locating academic materials. Doing so was a pleasure for aspects of the study unrelated to my tacit cultural knowledge such as finding corpus items. Summarizing and interpreting my findings related to my tacit knowledge has been considerably more difficult. I honor a scholarly burden of proof, but finding proof for something I know more viscerally than cognitively has been difficult. My large volume of tacit knowledge has been advantageous, but I have had to work hard to find and provide evidence for things that have seemed intuitive to me. I pray that I have provided the evidence that my globally northern peers need. Unfortunately, I have hesitated to assert thoughts that have hung between tacit and explicit levels because I have not known where to turn or how to find scholarly supporting evidence. May my intended thoughts and the words I have articulated speak in ways that need to be heard.

Future Analysis and Studies

Future Analysis of Current Case

To further analyze current interview data, I will recognize that rhetorical devices are unavoidable when talking about sensitive topics (Barnes et al., 2001). Given South Africa's history, many discussions involve sensitive topics such as perceptions of racial identity and violence, I will search for metaphors and other devices of linguistic cognition as an approach to inquiry (Todd & Harrison, 2008).

For further analysis of the corpus of texts, I will take a social network perspective regarding who cites whom to increase awareness of methodological genealogy, intertextuality, and historicity. For this analysis, I will use geographic information system and bibliographic software such as ArcGIS ("ArcGIS," 2015) and Citation Map (Hu, McKenzie, & Gao, 2013), as well as working manually to manage the limits of existing citation databases relative to literature of African origin. I will compile a database of multiple records per corpus item with one record per citation to map broad flows of quantitative, qualitative, mixed methods, participatory approaches, and other methodological topics.

Future Studies

Beyond the present case study, I recommend conducting other case studies across sub-Saharan regions. I expect that quantitative emphases in Nigeria and qualitative emphases in southern Africa could inform spatially and temporally varying influences of the global north. Beyond the African continent, case studies in other parts of the global south could bring to light broader influences of globally northern literature and methodologies, and the strength of that association. Conversely, further study could show that globally northern and southern distinctions are less relevant now than during of more heightened colonialism. I also recommend studying inquiry relationships within and across organizations, studies, and researchers to locate epistemological positions of organizations as well as researchers within and across research contexts.

Recommendations for Participant-Centered Research

This study has focused on tacit cultural knowledge through the case of mixed methods research in South Africa. These recommendations relate to the design and

implementation of mixed methods research, often in ways not limited to mixed methods approaches. Therefore, as in answering the first research sub-question, I reference South African methods literature beyond the immediate corpus, particularly in a qualitative vein. Because the instrumental nature of the case theoretically generalizes beyond the South African context (*grand generalizations* according to Stake, 1995), I state recommendations for participant-centered mixed methods research in general without specific geographic references. Given the level of contextual detail provided in this dissertation, I trust that readers will discern which recommendations apply to their contexts (see Stake, 1995, and Simons, 2009). I distinguish between recommendations for organizations and for research discourse.

Recommendations for Organizations Considering Mixed Methods Research

- Foster relational respect and communication between funders, publishers, inquirers, and participants of mixed methods studies (Brendon Barnes).
- Ask research questions for the good of communities and regions rather to than make organizations sponsoring mixed methods studies look good (Brendon Barnes).
- Embrace *less is more* by engaging fewer studies and perhaps fewer participants to allow more time for deeper meaning and to emphasize qualitatively dominant mixed methods studies.⁴²

⁴² I assert this recommendation based on explicit statements that research in South Africa requires time (Amanda Gouws) for talk and to get to know people (Yolandi Foster). Although he did not directly mention *less is more*, Brendon Barnes did put forth the problem of too many studies without corresponding change in urban townships such as Alexandra.

- Define ethicality around participants' voices by openly seeking unregimented trust, enthusiasm, and engagement for all phases of mixed methods studies (Yolandi Foster; see Ferreira, 2006 concerning conveying enthusiasm).
- Allow research plans to change flexibly (Brendon Barnes; Yolandi Foster), including the possibility that a study originally intended to involve only a qualitative or quantitative component may ultimately combine approaches, or that a mixed methods study may ultimately implement only a qualitative or quantitative component.
- Present methodological material in humble terms to calm anxieties without oversimplifying conceptual relevance, especially for quantitative aspects of studies (Xoliswa Mtose).
- View methods as a means to an end (Brendon Barnes; e.g. allowing local contexts to drive the choice of quantitative, qualitative, or mixed methods; and inviting theoretical and content-related issues in methodological publications).

Recommendations for Discursive Aspects of Mixed Methods Research

- Collaborate with people of cultural-linguistic style similar to that of participants for qualitative and for quantitative study components. My earlier descriptions of context-based literacies independent from spoken languages or education level inform this recommendation (see Yolandi Foster's comment regarding lack of familiarity with questionnaires and Amanda Gouws' description of lack of numeracy).
- Allow time and talk (including lively meandering conversations) to form rapport before formally starting a study, during qualitative data collection, in the format

and interaction of quantitative data collection (see Gobo, 2011 regarding conversational surveys), and in subsequent reporting.

- Accept that nomenclatures of mixed methods research may convey different nuances across speakers, languages, and Englishes, in accordance with the informing nature of varying ranges of meaning space (see Berendt, 2009 regarding cultural and language experiences influencing perceptions of semantic space).
- Gather qualitative and quantitative data in minimally structured ways to honor linguistic *stews*; for example, the *Mmogo-Method*TM projection technique per Roos (2012), visual stories per L. Theron, Mitchell, and Smith (2011), or non-verbal response cards per Bolton and Tang (2002) or per Chisugi Oswald as Figure 7.4 shows.
- Consider differing cultural expression of social emotions (e.g., doubt or confidence; see Ferrante, 2012) in interactions with participant (e.g., probing) as Xoliswa Mtose indicated.

Conclusion

The central question of this study has explored how tacit aspects of cultural knowledge influence mixed methods research in South Africa. Unapologetically, this exploration raises more questions than it answers, particularly concerning what terms mean in a highly plurilingual context.

Words are not things; rather, they symbolize things (Brannen, 2004). No single set of symbols (words or terms) maps with one-on-one correspondence to the things they represent. When interacting with participants, I recommend doing so through informal

vernacular language, styles and timing. As researchers and reviewers of ethical protocols, we hold a responsibility to translate our interactions into the daily vernaculars of research participants, regardless of their educational status.

As a specialist language, mixed methods is based on the world's dominant language of English. This may restrict conversation with methodologists of other languages or versions of English, a problem Lichtman (2012) acknowledged regarding qualitative researchers of various European linguistic traditions. Those of us who speak this dominant language natively would do well to consider the challenges of speakers and mixed methods learners whose native language is not globally dominant when functioning with the academic expectations of a language not our own. To the extent that mixed methods practitioners who are not native speakers learn the trade of mixed methods through academia, they must know much more than written and spoken English; they must also learn and apply eccentricities of academic ways (Henning et al., 2001).

As a specialist language (see Gee, 2014a), mixed methods involves somewhat separate vocabularies that relate to *qualitative*, *quantitative*, or *mixed methods*. These vocabularies are difficult to distinguish because they entail identities rather than inherent differences. Perhaps methodological terms, including *mixed methods*, could find a way to allow multiple correspondences, both in allowing other terms to serve similar roles, and by allowing *mixed methods* to serve multiple roles.

Embracing more than language, and based on South African examples, methodology is inherently relational. Hence, ontology, methodology, methods, and content are intertwined and inseparable. In this intertwined reality, roles between globally northern and southern inquirers, and between inquirers and participants, need to “hand

over the stick” (allow participants to lead) in establishing rapport (Ferreira, 2006, p. 111). Those of us in traditionally power-dominant roles need to take time to listen to participants or globally southern inquirers without interrupting processes that work in those contexts. This includes which research approaches to use and how to carry out those approaches. Research in any part of the world could further acknowledge the roles and importance of methodological generalists whose ways of thinking interact with and account for the realities of cultural-linguistic breadth and depth.

Reflecting on the nature of research interactions, Xoliswa Mtose said, “Researchers are hasty, hasty people.” But research is not a “check-the-box” endeavor (Brendon Barnes). Inquiry needs to avoid rushing and to allow time for participants to discover and learn what they need to know. As funders, stakeholders, or researchers, we must slow down our interactions to correspond with the timing of people with whom we work, whether they are participants or fellow researchers, and whether they affiliate with cultures of close or distant proximity to our own. Spending more time with participants requires pursuing fewer studies, perhaps collecting data among fewer participants, and deemphasizing the number of publications in the academy.

In addition, those outside a situation need to say to those who understand a situation with insider perspectives, “‘you can do it!’ and ‘you are the experts!’” (Ferreira, 2006, p. 112). Inquiry processes need to “go with the flow,” creatively adjust, and remain flexible to learn from rather than trying to avoid mistakes (p. 113). Inquirers need to consider, on a context-by-context basis, when to follow their own best judgments and when to be sensitive to the needs and ideas of participants and of other inquirers.

Altruistically, the final say needs to lie more with South African researchers and less with external principal investigators or funders.

As Creswell (2013a) recommends for case studies, I close by way of a vignette inspired by Leslie Green's (2012) article entitled *Beyond South Africa's 'indigenous knowledge – science' wars*. An oceanographer and a fisherman each go down to the sea to study the ocean. Each has valid experience and approaches. However, looking at the ocean, neither the oceanographer nor the fisherman has complete understanding of the vast body of water. Possibilities for expanding appropriate ways to study the ocean and all that it represents are infinite. Methods and methodologies are not static. They flow into each other and into their contexts, by which they are and must be determined. I challenge those of us who contemplate inquiry to consider how our approaches can account for tacit ways in which we and in which people in our immediate surroundings perceive knowledge.

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Appendix A : Corpus of Written Texts in Chronological Order*

| Author | Year | Title | 1st Author Institution | Document Type | Journal, Volume, Publisher, Advisor |
|--|------------------|--|---------------------------------|-----------------------|--|
| (Mouton) | 1983 | Kwantitatiewe en kwalitatiewe metodologie in die geesteswetenskappe (Quantitative and qualitative methodology in the humanities) | Human Sciences Research Council | Peer-reviewed article | Suid-Afrikaanse Tydskrif vir Sosiologie (South African Journal of Sociology) |
| (Mouton & Marais) | 1988 | Basic concepts in the methodology of the social sciences | Human Sciences Research Council | Monograph | Human Sciences Research Council |
| (Mouton) | 1996 | Understanding social research | Stellenbosch U | Monograph | Van Schaik, Pretoria SA |
| (Peltzer & Phaswana) | 1999 | Substance use among South African university students: A quantitative and qualitative study | (Former) U of the North | Web Page | Medical Research Council |
| (Terre Blanche & Durrheim)@ | 1999 (also 2006) | Research in practice: Applied methods for the social sciences | U of South Africa | Edited volume | U of Cape Town Press, Cape Town SA |
| (Muller) | 2000 | The quality of nursing service management in South African hospitals | (Former) Rand Afrikaans U | Peer-reviewed article | Curationis |
| (De Wet et al.) | 2001 | To take a holistic perspective on environmental health & developmental issues | (Former) Rand Afrikaans U | Peer-reviewed article | Social Science & Medicine |
| (de Vos)@ | 2002 (also 2011) | Research at grass roots: For the social sciences and human service professions | (Former) Rand Afrikaans U | Edited volume | Van Schaik, Pretoria SA |
| (de Vos) | 2002 | Combined quantitative and qualitative approach | (Former) Rand Afrikaans U | Book chapter | Research at grass roots |
| (Abrahams) | 2003 | Theory-based evaluation of community development: A South African case study | U of Stellenbosch | Doctoral thesis | Groenewald & Mouton |
| (Wagner) | 2003 | Placing psychology: A critical exploration of research methodology curricula in the social sciences | U of Pretoria | Doctoral thesis | Maree |
| (Barnes, Mathee, Shafritz, Krieger, Favin, et al.) | 2004 | Testing selected behaviours to reduce indoor air pollution exposure in young children | Medical Research Council of SA | Peer-reviewed article | Health Education Research |
| (Barnes, Mathee, Shafritz, Krieger, & Zimicki) | 2004 | A behavioral intervention to reduce child exposure to indoor air pollution: Identifying possible target behaviors | Medical Research Council of SA | Peer-reviewed article | Health Education and Behavior |
| (L. C. Theron) | 2004 | The role of personal protective factors in anchoring psychological resilience in adolescents with learning difficulties | North-West U | Peer-reviewed article | South African Journal of Education |
| (van Rensburg & | 2005 | Psychological resilience among sexually-molested girls in the late middle- | North-West U | Peer-reviewed | Child Abuse Research in South |

| Author | Year | Title | 1st Author Institution | Document Type | Journal, Volume, Publisher, Advisor |
|-------------------------|---------------------|--|------------------------|-----------------------|--|
| Barnard) | | childhood: A case study approach | | article | Africa |
| (Kruger) | 2005 | The appraisal and enhancement of resilience modalities in middle adolescents within the school context | U of Pretoria | Doctoral thesis | Prinsloo |
| (J. S. Phillips) | 2005 | Health risk behaviours among black adolescent females in the Strand: A mixed-methods investigation | U of Western Cape | Doctoral thesis | [unknown] ¹ |
| (Terre Blanche et al.)@ | 2006 (also 1999) | Research in practice: Applied methods for the social sciences | U of South Africa | Edited volume | U of Cape Town Press, Cape Town SA |
| (Mampane & Bouwer) | 2006 | Identifying resilient and none-resilient middle-adolescents in a formerly Black-only urban school | U of Pretoria | Peer-reviewed article | South African Journal of Education |
| (Chanza) | 2006 | Do youth structures facilitate meaningful youth participation in local government?: A case study of Msunduzi Municipality | U of KwaZulu-Natal | Master's thesis | Piper |
| (Maree)@ | 2007 (also 2010) | First steps in research | U of Pretoria | Edited volume | Van Schaik, Pretoria SA |
| (Draper & Louw) | 2007 | Primary health care in the South African context medical students' perspectives | U of Cape Town | Peer-reviewed article | South African Family Practice |
| (Hinckley et al.) | 2007 | The case of expectant fathers: Negotiating the changing role of males in a "female" world | U of Pretoria | Peer-reviewed article | Early Child Development and Care |
| (Maree & Louw) | 2007 | Die aard, doel en effektiwiteit van assessering in tersiêre wiskunde aan die Tshwane Universiteit van Tegnologie (The nature, purpose and effectiveness of assessment in tertiary mathematics at the Tshwane University of Technology) | U of Pretoria | Peer-reviewed article | Suid-Afrikaanse Tydskrif vir Natuurwetenskap en Tegnologie (South African Journal of Science and Technology) |
| (L. C. Theron) | 2007 | Uphenyo ngokwazi kwentsha yasemalokishini ukumelana nesimo esinzima: A South African study of resilience among township youth | North-West U | Peer-reviewed article | Child and Adolescent Psychiatric Clinics of North America |
| (Talmage) | 2007 | An exploratory mixed-methods study to determine factors which may affect satisfaction levels of patients outside of a clinical setting | Durban U of Technology | Master's thesis | Korporaal |
| (Barnes) | 2007 | The evaluation of a behavioural intervention to reduce the impact of indoor air pollution on child respiratory health | U of Witwatersrand | Doctoral thesis | Thomas & Gilson |
| (Carstens) | 2008 | Essay-writing module for second-year students of history | U of Pretoria | Peer-reviewed article | Per Linguam |
| (B. Johnson & Lazarus) | 2008 | The role of schools in building resilience of youth faced with adversity | U of Western Cape | Peer-reviewed article | Journal of Psychology in Africa |
| (Kruger & Prinsloo) | 2008 | The appraisal and enhancement of resilience modalities in middle adolescents within the school context | Private practice | Peer-reviewed article | South African Journal of Education |

¹ I identified Phillips' (2005) thesis through Google Scholar but have been unable to obtain the thesis.

| Author | Year | Title | 1st Author Institution | Document Type | Journal, Volume, Publisher, Advisor |
|-------------------------------------|------|---|------------------------|-----------------------|--|
| (Maree, Ebersöhn, & Vermaak) | 2008 | Confronting the effects of unemployment on achievement motivation: The case for postmodern career facilitation | U of Pretoria | Peer-reviewed article | Perspectives in Education |
| (Sao) | 2008 | Barriers to learning mathematics in rural secondary schools | U of Stellenbosch | Master's thesis | Perold & Murray |
| (van Vuuren) | 2008 | A strategy to manage diversity in secondary schools | North-West U | Doctoral thesis | van der Westhuizen |
| (Wagner & Okeke) | 2009 | Quantitative or qualitative: Ontological and epistemological choices in research methods curricula | U of Pretoria | Book chapter | Teaching research methods in the social sciences |
| (Bayaga & Moyo) | 2009 | An investigation into the relevance and applicability of university-wide risk awareness: Effect of risk policies and procedures | U of Fort Hare | Peer-reviewed article | Journal of International Social Research |
| (Czerniewicz & Brown) | 2009 | A study of the relationship between institutional policy, organisational culture and e-learning use in four South African universities | U of Cape Town | Peer-reviewed article | Computers & Education |
| (Engelbrecht) | 2009 | Indebtedness of financially vulnerable households: What do social workers do? | U of Pretoria | Peer-reviewed article | Social Work/Maatskaplike Werk |
| (Ngulube et al.) | 2009 | Utilisation and prevalence of mixed methods research in library and information research in South Africa 2002-2008 | U of South Africa | Peer-reviewed article | South African Journal of Libraries and Information Science |
| (Talmage, Korporaal, & Brantingham) | 2009 | An exploratory mixed-method study to determine factors that may affect satisfaction levels of athletes receiving chiropractic care in a nonclinic setting | Durban U of Technology | Peer-reviewed article | Journal of Chiropractic Medicine |
| (Van Riet) | 2009 | Qualitative and quantitative community level approaches: Disaster risk assessment in the Fezile Dabi District Municipality | North-West U | Peer-reviewed article | Africanus |
| (Wagner) | 2009 | The future of teaching research in the social sciences | U of Pretoria | Peer-reviewed article | South African Journal of Higher Education |
| (Lawrence) | 2009 | Resilience factors in families who have lost their homes in a shack fire | U of Stellenbosch | Master's thesis | Greeff |
| (Arndt) | 2009 | Attitudes towards bisexual men and women: The relationship between respondents' attitudes and their sexual orientation | U of Johannesburg | Doctoral thesis | de Bruin |
| (Maree) | 2010 | First steps in research | U of Pretoria | Edited volume | Van Schaik, Pretoria SA |
| (Jansen) | 2010 | The language of research | U of Pretoria | Book chapter | First steps in research |
| (Barnes) | 2010 | The Hawthorne effect in community trials in developing countries | U of the Witwatersrand | Peer-reviewed article | International Journal of Social Research Methodology |
| (Casale et al.) | 2010 | Dilemmas and tensions facing a faith-based organisation promoting HIV prevention among young people in South Africa | U of KwaZulu-Natal | Peer-reviewed article | African Journal of AIDS Research |
| (Chipunza & Gwarinda) | 2010 | Transformational leadership in merging higher education institutions: A case study | U of Fort Hare | Peer-reviewed article | SA Journal of Human Resource Management |
| (Evans) | 2010 | Eeny meeny miney mo – Choices and consequences for graduate study in educational linguistics | U of Pretoria | Peer-reviewed article | Per Linguam |
| (Kruizinga & | 2010 | An evaluation of guided reading in three primary schools in the Western Cape | Stellenbosch U | Peer-reviewed | Per Linguam |

| Author | Year | Title | 1st Author Institution | Document Type | Journal, Volume, Publisher, Advisor |
|-------------------------------------|------------------|---|-----------------------------|-----------------------|--|
| Nathanson) | | | | article | |
| (L. C. Theron & Theron) | 2010 | A critical review of studies of South African youth resilience, 1990-2008 | North-West U | Peer-reviewed article | South African Journal of Science |
| (Ngulube) | 2010 | Mapping mixed methods research in library and information science journals in Sub-Saharan Africa, 2004-2008 | U of South Africa | Peer-reviewed article | International Information & Library Review |
| (I.-M. du Toit) | 2010 | Educational interpreters and the Tomatis Method: A mixed methods study at the North-West University | North-West U | Master's thesis | du Plessis |
| (Kyeyune) | 2010 | The interpretation and use of mixed methods research within programme evaluation practice | U of Stellenbosch | Master's thesis | Mouton |
| (Luppe) | 2010 | Evaluation of the grassroots soccer club HIV/AIDS programme in Musina, South Africa | U of the Witwatersrand | Master's thesis | Rispel |
| (Mpumelelo) | 2010 | Views of parents in the Johannesburg Metro (Region 11) regarding reproductive health issues emanating from the Children's Act No 38 of 2005 as amended in 2008 | U of the Witwatersrand | Master's thesis | Ross |
| (Nundulall) | 2010 | Mentorship as a strategy to improve research output at tertiary institutions: A case study of University of Johannesburg | Durban U of Technology | Master's thesis | Reddy |
| (Saal) | 2010 | The forgotten ones: A case study of the obstacles that prevent meaningful participation in democratic governance of farm women in the greater Stellenbosch Area, Ceres & Rawsonville | U of Sandenbergh | Master's thesis | Amanda Gouws |
| (J. L. du Toit) | 2010 | A typology of designs for social research in the built environment | U of Stellenbosch | Doctoral thesis | Mouton |
| (N. Moyo, 2010) | 2010 | An investigation into the efficacy of interventions by multisectoral organisations in enhancing educational opportunities for school-going orphaned children in Gwanda District in Zimbabwe | U of Fort Hare | Doctoral thesis | Mtose |
| (Petros) | 2010 | The role of older persons in the management of HIV and AIDS: An assessment of their contribution and support needs in three South African Provinces | U of Cape Town | Doctoral thesis | [not indicated] |
| (de Vos, Strydom, Delpont, et al.)@ | 2011 (also 2002) | Research at grass roots: For the social sciences and human service professions | (Formerly) Rand Afrikaans U | Edited volume | Van Schaik, Pretoria SA |
| (Delpont & Fouché) | 2011 | Mixed methods research | U of Pretoria | Book chapter | Research at grass roots |
| (De Vos, Strydom, Schulze, & Patel) | 2011 | The sciences and the professions | (Formerly) Rand Afrikaans U | Book chapter | Research at grass roots |
| (De Vos & Strydom) | 2011 | Intervention research | (Formerly) Rand Afrikaans U | Book chapter | Research at grass roots |
| (Strydom) | 2011 | Participatory action research | U of Pretoria | Book chapter | Research at grass roots |

| Author | Year | Title | 1st Author Institution | Document Type | Journal, Volume, Publisher, Advisor |
|--|------|---|-------------------------------|-----------------------|---|
| (P. Greeff, Roos, Vorster, & Van Romburgh) | 2011 | Applying mixed-methods to assess the value of forensic interviewing from a person-centred approach | North-West U | Peer-reviewed article | Acta Criminologica |
| (Lamb & Simpson) | 2011 | Students' expectations of feedback given on draft writing | Nelson Mandela Metropolitan U | Peer-reviewed article | Per Linguam |
| (Naidoo) | 2011 | An empirical study on spiritual formation at protestant theological training institutions in South Africa | U of South Africa | Peer-reviewed article | Religion & Theory |
| (Loopoo) | 2011 | The use of adapted teaching strategies in literacy by grade three educators in the northern KwaZulu-Natal region | Durban U of Technology | Master's thesis | Singh |
| (Maart) | 2011 | Aligning the clinical assessment practices with the prosthetic curriculum | U of Stellenbosch | Master's thesis | Bitzer |
| (Marutha) | 2011 | Records management in support of service delivery in the public health sector of the Limpopo Province in South Africa | U of South Africa | Master's thesis | Ngulube |
| (Sherriff) | 2011 | The role of older persons in the management of HIV and AIDS: An assessment of their contribution and support needs in three South African Provinces | U of the Witwatersrand | Master's thesis | Pitman |
| (Bradfield) | 2011 | The development and validation of the Growing Disciples Inventory (GDI) as a curriculum-aligned self-assessment for Christian education | U of Stellenbosch | Doctoral thesis | C. Roux & Thayer |
| (Dehaloo) | 2011 | The motivation and job satisfaction of secondary school teachers in Kwazulu-Natal: An education management perspective | U of South Africa | Doctoral thesis | Schulze |
| (Murugan) | 2011 | Multigrade teachers' experiences in implementing a curriculum streamlined for the single grade classroom setting, in a multigrade classroom setting, and their professional development needs | U of Fort Hare | Doctoral thesis | Xoliswa Mtose |
| (Taljaard) | 2011 | An implementation model for integrated coastal management in South Africa: From legislation to practice | U of Stellenbosch | Doctoral thesis | van der Merwe |
| (van der Westhuizen) | 2011 | A social group work programme with adolescent orphans in foster care affected by HIV and AIDS: North West Province | North-West U | Doctoral thesis | A. Roux & Strydom |
| (Wildschut) | 2011 | A feminist investigation into the reasons for attrition of women doctors from the South African medical profession and practice: Exploring the case of UCT medical school between 1996 and 2005 | U of Sandenbergh | Doctoral thesis | Amanda Gouws |
| (Maree) | 2012 | Complete your thesis or dissertation successfully: Practical guidelines | U of Pretoria | Edited volume | Juta, Cape Town SA |
| (Wagner et al.) | 2012 | Doing social research: A global context | U of Pretoria | Edited volume | McGraw Hill Higher Education, London UK |
| (B. Morgan & Sklar) | 2012 | Sampling and research paradigms | U of Johannesburg | Book chapter | Complete your thesis or dissertation successfully: Practical guidelines |
| (Potter) | 2012 | Multi-method research | U of the Witwatersrand | Book chapter | Doing social research: A global context |
| (Seabi) | 2012 | Research designs and data collection techniques | U of the | Book chapter | Complete your thesis or |

| Author | Year | Title | 1st Author Institution | Document Type | Journal, Volume, Publisher, Advisor |
|------------------------------------|------|--|------------------------|-----------------------|---|
| | | | Witwatersrand | | dissertation successfully: Practical guidelines |
| (Barnes) | 2012 | Using mixed methods in South African psychological research | U of the Witwatersrand | Peer-reviewed article | South African Journal of Psychology |
| (Magano & Gouws) | 2012 | The academic self-concept of adolescents who live in disadvantaged home environments: A life orientation perspective | U of Johannesburg | Peer-reviewed article | Journal of Social Sciences |
| (Maree & Morgan) | 2012 | Toward a combined qualitative-quantitative approach: Advancing postmodern career counselling theory and practice | U of Pretoria | Peer-reviewed article | Cypriot Journal of Educational Sciences |
| (Mtose & Moyo) | 2012 | Psychosocial support offered to learners: A case of Gwanda district | U of Fort Hare | Peer-reviewed article | Journal of Social Sciences |
| (Petros) | 2012 | Use of a mixed methods approach to investigate the support needs of older caregivers to family members affected by HIV and AIDS in South Africa | U of Cape Town | Peer-reviewed article | Journal of Mixed Methods Research |
| (Schneider et al.) | 2012 | Gender differences in experiences of ART services in South Africa: A mixed methods study | U of the Western Cape | Peer-reviewed article | Tropical Medicine & International Health |
| (Van der Walt & Potgieter) | 2012 | Research method in education: The frame by which the picture hangs | North-West U | Peer-reviewed article | International Journal of Multiple Research Approaches |
| (Andries Gouws) | 2012 | Location assessment of independent jewellery retailers: Analysis of Cape Town metropolitan regional shopping centres | U of Stellenbosch | Master's thesis | Ungerer |
| (Msabab) | 2012 | Exploring the dynamics of the refugee phenomenon and it's relevance in South Africa's development: Towards the merging of theory and practice for ministry to refugees | U of Stellenbosch | Master's thesis | August |
| (Boshoff) | 2012 | Knowledge utilisation in the South African wine industry | U of Stellenbosch | Doctoral thesis | Mouton |
| (O'Toole) | 2012 | The impact of transformational leadership on the delivery of safety and productivity excellence at Impala Platinum | U of South Africa | Doctoral thesis | Okharedia |
| (Yates) | 2012 | Die promovering van kinderregte: 'n Prakties-teologiese ondersoek | U of Stellenbosch | Doctoral thesis | Swart & Human |
| (Bless et al.) | 2013 | Fundamentals of social research methods: An African perspective | Subcontractor | Monograph | Juta, Cape Town SA |
| (Wissing) | 2013 | Well-being research in South Africa | North-West U | Edited volume | Springer |
| (A. P. Greeff) | 2013 | Aspects of family resilience in various groups of South African families | U of Stellenbosch | Book chapter | Well-being research in South Africa |
| (Kirsten & du Plessis) | 2013 | Positive psychology and subclinical eating disorders | North-West U | Book chapter | Well-being research in South Africa |
| (Koen, van Eeden, Wissing, & Koen) | 2013 | The stories of resilience in a group of professional nurses in South Africa | North-West U | Book chapter | Well-being research in South Africa |
| (Thekiso et al.) | 2013 | Psychological well-being, physical health, and the quality of life of a group of farm workers in South Africa: The FLAGH study | North-West U | Book chapter | Well-being research in South Africa |

| Author | Year | Title | 1st Author Institution | Document Type | Journal, Volume, Publisher, Advisor |
|------------------------------|-------------|---|-----------------------------------|--------------------------|--|
| (van Schalkwyk & Wissing) | 2013 | Evaluation of a programme to enhance flourishing in adolescence | North-West U | Book chapter | Well-being research in South Africa |
| (Wissing) | 2013 | Conclusions and challenges for the future | North-West U | Book chapter | Well-being research in South Africa |
| (Bayaga & Mtose) | 2013 | Quantifying human error via operational risk analysis: Ecological disposition | U of Fort Hare | Peer-reviewed article | Journal of Social Science |
| (Wildschut & Gouws) | 2013 | Male(volent) medicine: Tensions and contradictions in the gendered re/construction of the medical profession in South Africa | U of Stellenbosch | Peer-reviewed article | South African Review of Sociology |
| (Baldry) | 2013 | Graduate unemployment in South Africa: Prevalence, characteristics and perceived causes | U of Witwatersrand | Master's thesis | Barnes (advisor) |
| (Basson) | 2013 | A review of methodological trends in South African sociology, 1990–2009 | Stellenbosch U | Master's thesis | Prozesky |
| (W. Louw) | 2013 | Community-based educational programmes as support structures for adolescents within the context of HIV and AIDS | U of Pretoria | Doctoral thesis | Hartell |

*Corpus items include the terms *qualitative* and *quantitative*, *combined methods*, *mixed methods*, *multi methods* anywhere in the body of the text and are sorted by year, item type, and author.

@Corpus volumes with multiple editions are listed separately but counted once. Individual chapters are listed only under the latest year except those that were not included in a later edition.

Appendix B : Corpus Analysis Protocol

DOCUMENT INFORMATION
(IMPLICIT, EXPLICIT, or RECOMMENDED)

| | |
|---|--|
| How does the author describe qualitative and quantitative components of research? | |
| How does the author describe mixed methods research , including <i>timing</i> of and relative <i>emphasis</i> between qualitative and quantitative aspects of the study? | |
| What paradigms does the authors describe for using mixed methods? | |
| What rationale for using mixed methods does the author give or imply? | |
| How does the author describe the process of mixing or combining qualitative and quantitative aspects of a study? | |
| What problems or needs does the author describe in implementing mixed methods studies? | |

Appendix C : Interview E-Mail of Invitation

Dear Dr. [sur_name]:

I am a PhD student of Dr. John Creswell's at the University of Nebraska-Lincoln. For my dissertation, I am exploring hidden aspects of knowledge production that contextualize the phenomenon of mixed methods research. I lived most of my formative years between 1962 and 1980 in Swaziland and South Africa. Structures of apartheid touched me deeply, hence the reason for bounding my case study within South Africa.

Because you supervised [thesis_citations] and published [publications], I believe your thoughts could contribute meaningfully to my study. **Would you be willing** and available to participate in an in-person loosely structured interview between 22 July and 12 August? I expect the interview will last about 2 hours and will provide a R1 000 gift certificate to Amazon.com if you choose to participate.

If you would like to participate, please

- respond to this email message suggesting dates between 22 July (or earlier) and 12 August 2013,
- suggest a location where you would like to meet,
- feel free to ask any questions you have about my study or my background, and
- indicate what language you prefer for the interview.

Ngikhuluma kancani isiZulu najabula ukuletha amaZulu ukusisiza. Ek sal bly wees om “n Afrikaans assistent te bring. I do not speak other languages, but will be happy to bring an isiXhosa or other language assistant.

I sincerely hope you will participate and look forward to meeting you.

Sincerely,

Debra (Debbie) R. Miller
PhD student: Quantitative, Qualitative, and Psychometric Methods
(078) 2480934 (S.A. prior to 14 August, 2013)
00-1-402-613-5177 (U.S. after 14 August, 2013)

Liewe Dr. [sur_name]:

Ek is “n PhD student van Dr. John Creswell by die Universiteit van Nebraska-Lincoln. Vir my virhandeling ondersoek ek verborge aspekte van kennis produksie wat die verskynsel van gemengde metodes navorsing kontekstualiseer. Ek het die meeste van my vormingsjare tussen 1962 en 1980 in Swaziland en Suid-Afrika gewoon. Strukture van apartheid het my diep geraak, vandaar die rede vir my gevallestudie in Suid-Afrika.

Omdat U het [tesis] toesig hou en het [publikasie], glo ek dat U gedagtes sinvol kan bydra vir my studie. Is U bereid en beskikbaar om deel te neem in 'n in-persoon semi-gestruktureerde onderhoud tussen 22 Julie en 12 Augustus, 2013? Ek glo dat the onderhoud ongeveer 2 ure sal neem en sal 'n R1 000 geskenk sertifikaat aan Amazon.com bied as U kies om deel te neem.

Indien U belangstel in die onderhoud deel te neem,

- reageer asseblief op hierdie e-pos boodskap wat daarop dui datums tussen 22 Julie (of vroeër) en 12 Augustus 2013
- dui asseblief op “n plek om te voldoen aan,
- indien U enige vrae het, voel vry om te vra, en
- laat weet asseblief watter taal U verkies vir die onderhoud.

Ek sal bly wees om “n Afrikaans assistent te bring. Ngikhuluma kancani isiZulu najabula ukuletha amaZulu ukusisiza. Ek praat nie ander tale nie, maar sal bly wees om “n isiXhosa of ander taal assistent te bring.

Ek hoop van harte U in staat is om deel te neem en sien uit daarna om U te ontmoet.

Opreg,

Debra (Debbie) R. Miller

PhD student: Kwantitatiewe, Kwalitatiewe, en Psigometriese Metodes

(078) 2480934 (S.A. voor 14 Augustus, 2013)

00-1-402-613-5177 (U.S. na 14 Augustus, 2013)

Appendix D : Interviewee Backgrounds

| Feature | Brendon Barnes | Amanda Gouws | Yolandi Foster | Xoliswa Mtose |
|----------------------------------|--|---|--|---|
| Institution at time of interview | • University of Rivierplek* | • University of Sandenbergh* | • University of Palesa* | • University of Bangizwe* |
| Institution Type | • Traditional / Urban • Formerly HWU | • Traditional / Urban` • Formerly HWU | • Traditional / Urban • Formerly HWU | • Traditional / Rural • Formerly HBU |
| Title | • Associate Professor (Psychology) | • Professor & Chair (Political Science) | • Associate Professor (Educational Psychology) | • Executive Dean (Education) |
| Education | • U of Natal; U of Witwatersrand (PhD) | • Rand Afrikaans U.; U of Illinois (PhD) | • U of Pretoria (including PhD) | • U of Fort Hare; U of Cape Town; Rhodes U; U of Stellenbosch; Harvard U; U of KwaZulu-Natal (PhD) |
| Discipline | • Environmental health psychology | • Political science & feminist studies | • Community/Educational Psychology | • Education & Psychology |
| Background | • Multidisciplinary research psychology (QUAN dominant) • Methodological pluralism | • Feminist standpoint theory | • Participatory action research (QUAL dominant) | • Executive member SA Anti-racism Network in Higher Education |
| Key publications | • <i>Class, resistance, and the psychologization of development in South Africa</i> (Barnes & Milovanovic, 2015) • <i>Using mixed methods in South African psychological research</i> (Barnes, 2012) • <i>The Hawthorne effect in community trials in developing countries</i> (Barnes, 2010) • <i>The denial of racism the role of humor, personal experience, and self-censorship</i> (Barnes et al., 2001) | • <i>Experiments in democratic persuasion</i> (Gibson & Gouws, 2003) | • <i>Formative evaluation of the STAR intervention: Improving teachers' ability to provide psychosocial support for vulnerable individuals in the school community</i> (Ferreira & Ebersöhn, 2011) • <i>The case of expectant fathers: Negotiating the changing role of males in a 'female' world</i> (Hinckley et al., 2007) | • <i>Race troubles: Race, identity and inequality in post-apartheid South Africa</i> (Durrheim et al., 2011) • <i>Psychosocial support offered to learners: A case of Gwanda district</i> (Mtose & Moyo, 2012) |
| Formal MM exposure | • Own work; MM “saved him” • PhD: Qual to explain Hawthorne effect in control group after quasi-experimental trial • International authors: Michael Quinn Patton (qual) & Alan Bryman • SA: Kevin Durrheim & Linda Richter | • Complex contexts led to combining before formal awareness • Learned MM name from sociologists • SA: Henry Coetzee (quan training in UK); Bob Mattes (quan); Johann Mouton | • Idea of MM before heard term • International influences: John Creswell | • SA: in classes (U of Stellenbosch); Kevin Durrheim • International authors: John Creswell |
| MM advising | • Kim Baldry (2013): graduate unemployment | • Angelique Wildschut (2011): attrition of women doctors | • [none] | • N. Moyo (2010): school-going orphaned children in Zimbabwe • Priscilla Murugan (2011): multigrade teachers |

See Appendix E for a list of abbreviations used throughout tables.

Appendix E : Abbreviations Used in Tables and Text

| Abbreviation | Representation |
|--------------|---|
| CE | Closed-ended |
| Demo | Demonstrate |
| Ed | Education/educational |
| HBU | Historically black universities |
| HWU | Historically white universities |
| ID | Identity |
| Lang | Language |
| MM | Mixed methods |
| <i>n</i> | Sample size or # |
| Nat'l | National |
| NRF | National Research Foundation |
| OE | Open-ended |
| Org | Organisation |
| PAR | Participatory action research |
| Qre | Questionnaire |
| qual | Qualitative (lower priority than quan) |
| Qual | Qualitative (no reference to priority) |
| QUAL | Qualitative (higher priority than quantitative) |
| quan | Quantitative (lower priority than qual) |
| Quan | Quantitative (no reference to priority) |
| QUAN | Quantitative (higher priority than qual) |
| Rep | Representative |
| RQ | Research question |
| SA | South Africa |
| Stat | Statistics/statistical |
| U | University |

Appendix F : English Consent Form



COLLEGE OF EDUCATION AND HUMAN SCIENCES
Educational Psychology

INFORMED CONSENT FORM

What hidden aspects of cultural knowledge contextualize mixed methods research in South Africa?

What language do you prefer to speak for this conversation? Wulimi uyeniyula? Watter taal verkees u om te praat vir hierdie gesprek?

A few weeks ago, I contacted you about participating in a study that explores hidden aspects of cultural knowledge contextualizing mixed methods research in South Africa. I invited you to participate in the study because you have published a mixed methods study or supervised a mixed methods dissertation. You agreed to participate but you may now confirm again or decline to participate in the interview.

If you participate in this study, I will guide you through a partially structured interview for up to two hours. You will be free to respond to each question as you wish without existing response options. You may refrain from responding to any questions you prefer not to answer. You may also choose not to participate in the interview at all, or to end the interview at any point. You will encounter no negative consequences if you do not participate. I will audio-record the interview if you give permission.

If you participate, I will provide you with a 1 000 Rand gift certificate for Amazon.com. I expect no other risks or benefits from participating in the research. The experience may be pleasant, and information from the study may increase your awareness of mixed methods research relative to cultural needs and influences inside and outside South Africa.

I will keep audio recordings on my password-protected laptop until I complete my PhD, expected in 2014, after which I will destroy them. I will keep interview transcript indefinitely to publish journal articles and present at conferences. This qualitative study will involve only six interviews in addition to a set of journal articles, theses, and textbooks. I will refer to your answers individually in some passages and in combination with other participants in other passages of results. You may choose for me to identify you by your actual name, or for me to choose a pseudonym by which to identify you in the interview transcripts, in my dissertation, in journal articles, and at conferences.

You may ask questions about this research any time before, during or after the interview. You need not agree to participate in the interview until I answer all questions you have. You may contact me in any of the ways listed at the bottom of this document for concerns about the research or about any other questions. Sometimes participants have questions or concerns about their rights. If questions or concerns arise, contact the University of Nebraska-Lincoln Research Compliance Services at 402-472-6965 or irb@unl.edu.

There is no requirement for you to participate in this study. If you participate, you may withdraw at any time without harming your relationship with the University of Nebraska-Lincoln or with myself, and without other loss. If you want to participate, please tick the boxes for ways in which you are comfortable doing so. Your signature will indicate your decision to participate, and that



you have read and understand the information on this form. I will also email you a copy of your signed form to keep.

Please tick any of the following boxes that concur with your wishes:

- ☐ You agree to participate in a **one-on-one interview** with Debbie Miller in this location
- ☐ You agree to participate in a **one-on-one interview** with Debbie Miller in another location
- ☐ You agree to be **audio** recorded during the interview

_____ Your Signature / /

How do you prefer I refer to **you** when I report your comments?

- ☐ Your name → _____
- ☐ A pseudonym Debbie Miller assigns

How you prefer I refer to **your institution**?

- ☐ Your institution's name → _____
- ☐ A pseudonym Debbie Miller assigns

Debbie Miller, MS, Principal Investigator

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Appendix G : Afrikaans Consent Form



COLLEGE OF EDUCATION AND HUMAN SCIENCES
Educational Psychology

INGELIGTE TOESTEMMING VORM

Wat verborge aspekte van kulture kennis kontekstualiseer gemengde metodes navorsing in Suid-Afrika?

Watter taal verkeer u om te praat vir hierdie gesprek? Wulimi uyenyula? What language do you prefer to speak for this conversation?

'n Paar weke gelede het ek u geskryf oor deel te neem aan 'n studie wat ondersoek verborge kulturele kennis van gemengde metodes navorsing in Suid-Afrika. Ek het U genooi om deel te neem in die studie omdat U 'n gemengde metodes studie gepubliseer het of 'n gemengde metodes verhandeling toesig het. U het ingestem om deel te neem, maar U kan nou weer bevestig of weier om in die onderhoud deel te neem.

As U deelneem aan hierdie onderhoud, sal ek U deur 'n gedeeltelik gestruktureerde onderhoud vir tot twee ure lei. U sal vry wees om te reageer op elke vraag as wat U wil, sonder bestaande reaksie opsies. U kan weerhou om te reageer op enige antwoorde wat U kies. In die verkies ken U wyer om nie op hierdie onderhoud deel te neem nie, of U kan enige tyd versoek om die onderhoud te beëindig. As U instem sal dit vir my toepaslik wees om 'n opname van ons onderhoud te maak.

As U deelneem sal ek U 'n 1 000 Rand geskenk sertifikaat vir Amazon.com gee. Ek verwag geen ander risiko's of voordele van deelname aan die navorsing. Die ervaring kan aangename wees, en miskien U bewustheid van gemengde metodes navorsing met betrekking tot kulturele behoeftes en invloede binne en buite Suid-Afrika verhoog.

Ek sal klank opnames op my wagwoord beskerm elektroniese Google Drive hou totdat ek my PhD voltooi, wat na verwagting in 2014, waarna ek die klank opnames sal vernietig. Ek sal die onderhoud transkripsies onbepaald hou, om tydskrifartikels en teenwoordig by konferensies te publiseer. Hierdie kwalitatiewe studie behels slegs ses onderhoude in bykomende tydskrif artikels, tesis, en handboeke wat geskryf sal word. Ek sal na U antwoorde individueel verwys in sommige gedeeltes en in kombinasie met ander deelnemers verwys in ander gedeeltes van die resultate. U kan kies om U self te identifiseer deur U werklike naam te gebruik, of indien U verkies maag U 'n skuilnaam gebruik.

U kan enige tyd voor, tydens of na die onderhoud vrae vra. Indien U verkies, kan U jou toestemming weer hou tot dat ek al U vrae beantwoord het. As U enige bekommernis het, voel gerus om my te kontak op enige manier soos aangedui onder hierdie dokument. Soms kry deelnemers vrae of kommentaar oor hul regte. Indien U enige vrae of kommentaar ontstaan, kontak die Universiteit van Nebraska-Lincoln Navorsing Nakoming Dienste by 402-472-6965 of irb@unl.edu.

Daar is geen vereiste vir U om deel te neem in hierdie studie. As U deelneem, U kan enige tyd onttrek sonder benadeling van jou verhouding met die Universiteit van Nebraska-Lincoln of met my, en sonder ander verlies. As U wil deelneem, merk asseblief die bokse vir maniere waarop U gemaklik is om dit te doen. U handtekening sal aandui jou besluit om deel te neem, en dat u



IRB # 20130613482 EK
Date Approved: 06/25/2013
Valid Until: 06/24/2018

gelees het en verstaan die inligting op hierdie vorm. Ek sal ook U e-pos 'n afskrif van U getekende vorm te hou.

Merk asseblief enige van die volgende bokse wat ooreenstem met U wense:

- ☐ U stem saam om deel te neem in 'n een-tot-een onderhoud met Debbie Miller in hierdie plek
- ☐ U stem saam om deel te neem in 'n een-tot-een onderhoud met Debbie Miller in 'n ander plek
- ☐ U stem in om 'n klank opname van die onderhoud te maak

U Handtekening

_____/_____/_____/_____
M M D D J J J J

Hoe verkies U om verwys te word as ek kommentaar lewer oor wat U sê?

- ☐ U naam → _____
- ☐ 'n Skuilnaam wat Debbie Miller toewys

Hoe verkies U om U **institusie** verwys te word?

- ☐ Die naam van U instelling → _____
- ☐ 'n Skuilnaam wat Debbie Miller toewys

Debbie Miller, MS, Hoof Ondersoeker

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Appendix H : Interview Protocol

Case of SA MM - Interview Protocol

1

| | |
|---|---------------|
| Time of Interview: | Debbie Miller |
| Date: | |
| Location: | |
| Interviewer: | |
| Interviewee: | |
| Interviewee position: | |
| Elicit consent Turn on and test audio-recorder | |

| Introduction | |
|---|--|
| Confirm language: | <i>What language do you prefer for to speak for the interview?</i> <i>Watter taal verkees u vir die onderhoud te praat?</i> |
| <i>Reflect on my comfort with the language.</i> | |
| Purpose: | <div style="border: 1px solid black; background-color: yellow; padding: 10px;"> <p>The purpose of this study is to explore hidden cultural aspects of knowledge production as context for the phenomenon of mixing qualitative and quantitative methods of research.</p> </div> |

| Warm-Up | |
|-------------|--|
| Icebreaker: | Tell me about your research at [(prior) institution(s)]. <i>Prompt: formal or informal research</i> |

| Perceptions of MM, Qual & Quan | |
|--------------------------------|---|
| MM: | What do you think of when you hear the term, “ mixed methods research ”? <i>Prompt: What do South African researchers think of?</i> |
| Qual & quan | What do you think of when you hear the terms, “ qualitative ” or “ quantitative ” research? <i>Prompt: What do South African researchers think of?</i> |
| Lean qual/quant | Are you (researchers in South Africa) more likely to use qualitative or quantitative methods? <i>Prompt: either in a formal or an informal sense</i> |

| MM Use/Familiarity | |
|-----------------------------|---|
| Motivation | <p>What has motivated you to use MMR?</p> <p><i>Prompt: What has motivated South African researchers?</i></p> <p><i>Prompt: To understand issues inside / outside South Africa?</i></p> |
| How familiar | <p>How did you become familiar with mixed methods research?</p> <p><i>Prompt: How did you become <u>aware</u> of MMR?</i></p> <p>... either in essence or by the name 'MMR'?</p> |
| Benefits & consequences | <p>What are the benefits or consequences of South African researchers using mixed methods research?</p> <p><i>Prompt: To understand issues <i>inside</i> South Africa?</i></p> |
| Grand tour – MM involvement | <p>How would you describe your involvement in mixed methods research?</p> <p><i>Prompt: What <i>experiences</i> have you had with MMR?</i></p> |
| Implementation | <p>How do researchers in South Africa implement mixed methods?</p> <p><i>Prompt: Formally or informally?</i></p> |

| Interaction of Culture & MMR | |
|------------------------------|---|
| Cultural Influences | <p>What aspects of South African cultures influence mixed methods research in South Africa?</p> <p><i>Prompt:</i> Either formal or informal aspects of MMR?</p> |
| Serve / fail to serve | <p>In what ways does mixed methods research serve or fail to serve the needs of South African participants?</p> <p><i>Prompt:</i> Either South African or western approaches to MMR?</p> |
| Further reflect SA | <p>How could mixed methods research in South Africa further reflect South African culture?</p> <p><i>Prompt:</i> Either South African or western approaches to MMR?</p> |
| Capture meanings | <p>How do you attempt to capture participant meanings when you conduct social research?</p> <p><i>Prompt:</i> What may you do informally or without thinking about it to capture meanings?</p> |
| Cultural Influences | <p>What aspects of Western cultures influence mixed methods research in South Africa?</p> <p><i>Prompt:</i> for better or for worse?</p> |
| Informed consent | <p>In what ways do you think western informed consent processes are appropriate or inappropriate for research conducted in South Africa?</p> <p><i>Prompt:</i> How do informed consent processes relate to <i>belief systems</i> of people in southern Africa?</p> |

| | |
|----------------|--|
| Check Results | Closing I'd like to check a few things with you [<i>review my understanding of main points</i>]. <ul style="list-style-type: none"> - Perceptions of MM / qual / quan - Purpose & familiarity with using MMR - Interaction of culture & MMR |
| Anything else? | What else you would like me to know? |

Baie Dankie!

Thank you very much for the interview!!!

Give gift card

| Probes | |
|----------------------|--|
| Other SA Perceptions | How South African mixed methods researchers / participants <ul style="list-style-type: none"> - think - do - feel - lean - perceive |
| Formality | Formally or informally? |
| Western sources | Expected to publish in Western sources? |
| Purpose | For understanding issues inside / outside South Africa? |
| Better / Worse | <i>For better? For worse?</i> |
| Terminology | What other terms might you use for that idea? |
| Name | Own name? Pseudonym? |
| Other | Other roles? Studies? Ways? Other things you want to tell me? Want me to know? What else? |
| Privacy | With or without the audio recorder on? |

Appendix I : Interview Transcription Symbols

| Meaning | Symbols |
|-------------------------------------|-------------------|
| Unintelligible utterances | [] |
| Opposite interlocuter outside turn | () |
| Utterances overlapping across turns | ~ |
| Lengthened syllable | : |
| Emphasized utterance | <u>Underlined</u> |
| Shorter pauses | , |
| Longer pauses | ... |

Appendix J : Interview Transcript--Excerpt from Xoliswa Mtose

DM: Thank you [softly] (Aheheh), ahuh. This is really good, because this is my last scheduled interview. I'm hoping I may be able to get one next week but, before today, I wasn't feeling like my work was complete (oh-hehehehuh) ... and I was feeling somewhat desperate that, I have to leave next week and, I don't have interviews to feel like I've really satisfied (yeh) my questions. And now I think you've sort of completed the circle (ah, I'm grateful) to say (aheh, I'm happy that you do) ~ "all right, OK"

XM: I was worried about this interview more than you are because I always feel, I'm always skeptical ... not about people that interview you, I'm very critical, I think of, I get worried about going out to do interview because, you can as a researcher, you know you've got your problem questions which I don't have to know "what is your program?" "why are you going out?" "what answers are seeking?" but from sitting on this seat now, I was worried about, because most of the time I sit there where you sitting (yes, yes) and I'm an interviewer. And I can pick it up and it irritates me when I go out and the interviewee wastes my time because I get nothing, because the person assumes that she or he knows what I'm looking for and therefore is trying so hard to give me the correct answers (a:h), so that's what has worried me (yes) from the beginning to say "I'm glad to be myself" (yes), and be as beliberated, to be as stupid as I want to and say the things that I want to but, I'm just hoping that it benefits you (yes) whatever nonsense I'm talking at the end.

Appendix K : Glossary of African Terms

Africans (or *the Africans*) are *black* people as *white* people in South Africa commonly refer to them.

Afrikaans is one of post-apartheid South Africa's 11 official languages. It both represents apartheid, and is also the language of many people who have not directly descended from a historically perceived Afrikaans ethnicity.

Afrocentrism is a view that people of Africa or of African descent are actors rather than people to be acted on (Bethel, 2003).

Apartheid was a period of imposed segregation in South Africa, the height of which lasted from the late 1940s until 1994.

Bantu is literally the word for people in many African languages. By connotation, it refers to *black* or *African* people.

Blacks (commonly called *Africans*) are people of South Africa without *white*, *coloured*, or *Indian* blood, as defined during apartheid. They are one of three non-white and four perceived racial groups.

Coloureds are people of South Africa who have descended from both white and black backgrounds as defined during apartheid. They are one of three non-white and four perceived racial groups.

English is one of post-apartheid South Africa's 11 official languages. The South African family of Englishes fall into an outer rather than the American and British inner circle (Jenkins, 2009; Kamwangamalu, 2003).

Eurocentrism is a view that people of European descent are actors and that people of Africa or of African descent are to be acted on (Bethel, 2003).

The *global north* is a metaphor for people of western (European) descent that may at times include parts of the Asian world (Comaroff & Comaroff, 2012).

The *global south* is a metaphor for people of nonwestern (non-European) descent (Comaroff & Comaroff, 2012) from which I exclude Asian regions.

Illegals denoted black Africans whom the state perceived as trespassing in areas for which they did not have a pass during South Africa's apartheid years.

Indians are people of South Africa who have descended from Indian blood, as defined during apartheid. They are one of three non-white and four perceived racial groups.

Ndebele is one of post-apartheid South Africa's 11 official languages and is related to isiZulu and isiXhosa.

Post-apartheid is the period since the formal end of South African apartheid in 1994.

sePedi is one of post-apartheid South Africa's 11 official languages and is also known as Northern Sotho.

seSotho is one of post-apartheid South Africa's 11 official languages and is also known as Southern Sotho.

siSwati is one of post-apartheid South Africa's 11 official languages.

Townships are areas on city peripheries that, prior to the end of apartheid, were often underdeveloped and lacked water, sanitation, or electricity (Schütten, 2013).

Translingual stew is my term for ever-present practices of throwing words from many different languages into sentences across long segments of conversation to an extent that defies awareness of individual languages. I compile the term with reference to

a friend, Eliam Nxumalo, who talks about preaching in a linguistic stew, and to Pennycook's (2006) position that the word *translingual* actively stands against overly simplified perceptions of speech.

xiTsonga is one of post-apartheid South Africa's 11 official languages.

seTswana is one of post-apartheid South Africa's 11 official languages.

tshiVenda is one of post-apartheid South Africa's 11 official languages.

isiXhosa is one of post-apartheid South Africa's 11 official languages and is related to isiZulu and Ndebele.

isiZulu is one of post-apartheid South Africa's 11 official languages and is related to isiXhosa and Ndebele.

Urban natives were *black* people who had moved from rural reserves to cities by the 1920s.

The *west* (similar to the *global north*) loosely refers to the United States, Canada, Europe, Australia, and New Zealand.

Whites are people of South Africa without *black*, *coloured*, or *Indian* blood, as defined during apartheid. They are one of four perceived racial groups.

Appendix L : Stanza Transcript from Xoliswa Mtose

Timeline: This excerpt follows a section where Xoliswa spontaneously raises the point that ethics requirements help to improve the way studies are implemented vs. rushing into the field.

| Turn # | Time Stamp | Speaker | Line # | Over- lap | Contents | Comments |
|---|------------|---------|--------|--------------|---|---|
| FRAME: DEBBIE QUESTIONS APPROPRIATENESS OF ETHICS & CONSENT FORMS | | | | | | |
| INVOLVED IN U.S. ETHICS & CONSENT FORMS? | | | | | | |
| 55 | 25:21 | DM | 1 | | Stanza 1 I <u>do</u> , have another question / | 'I do have' = ability & constraint? |
| | | | 2 | | about, ethics , // | |
| | | | 3 | | um ... I'll go ahead and ask it here. // | 'I'll go ahead' = state & action |
| 55 | | DM | 4 | | Stanza 2 It's really [<i>rising pitch</i>], not directly part of my dissertation / | 'My dissertation' = ownership? Achievement? |
| | | | 5 | | but I want to have this, / | 'I want' = affective |
| | | | 6 | | information for the future. // | |
| 55 | | DM | 7 | | Stanza 3 Have you seen, / | 'You seen' = cognition |
| | | | 8 | | have you been involved in studies / | 'You been involved' = state & action |
| | | | 9 | | that have involved U.S. consent forms ? // | |
| ANSWER TO U.S. CONSENT INVOLVEMENT | | | | | | |
| 56 | | XM | 10 | | Stanza 4 Yes. // | |
| U.S. CONSENT FORMS APPROPRIATE? | | | | | | |
| 57 | 25:45 | DM | 11 | | Stanza 5 To what extent do you feel / | 'You feel' = affective |
| | | | 12 | | the U.S. consent forms are, / | |
| | | | 13 | | appropriate for participants, / | |
| | | | 14 | | in South Africa? // | |
| EXPOSITION: COLONIZING PERSPECTIVE IS GONE! | | | | | | |
| XOLISWA PUT TOGETHER ETHICS & CONSENT FORMS WITH U.S. | | | | | | |
| 58 | 25:58 | XM | 16 | | Stanza 6 [<i>pause before statement; then more quietly & a bit slower</i>] I have not, | 'I have not' = ability & constraint 'I think'=cognition 'I have' = ability & constraint |
| | | | 17 | | eh / | |
| | | | 18 | | ... I think in the studies that I have <u>done</u> / with United States. // | |

| Turn # | Time Stamp | Speaker | Line # | Over- lap | Contents | Comments |
|--------|------------|---------|--------|--------------|---|--|
| 58 | | XM | 19 | | Stanza 7 eh, because I have been working as a consultant, / | <i>'I have' = ability & constraint</i> |
| | | | 20 | | we have looked at the cultural <u>differences</u> , / | <i>'We have' = ability & constraint</i> |
| 58 | 26:16 | XM | 21 | | Stanza 8 in terms of <u>putting</u> together the / | |
| | | | 22 | [| ethics (mhm [<i>quietly</i>]) / | |
| | | | 23 | | and the, the consent forms. // | |
| | | | | | XOLISWA ASSERTS HER SENSITIVITY | |
| 58 | 26:20 | XM | 24 | | Stanza 9 And I've been sensitive to <u>things</u> / | <i>ASSERTING RESPONSIBILITY SHE TAKES</i> |
| | | | 25 | | that would, [<i>pause</i>] would mean / | <i>'I've' = ability & constraint</i> |
| | | | 26 | [| for the researcher to be insensitive (yes [<i>quietly</i>]). // | |
| | | | | | XOLISWA WORKED WITH U OF PA | |
| 58 | 26:30 | XM | 27 | | Stanza 10 I've worked with them from <u>wa:y</u> back / | <i>'I've' = ability & constraint</i> |
| | | | 28 | | I think, 1999 up to <u>now</u> ! / | <i>'I think' = cognition</i> |
| 58 | 26:36 | XM | 29 | | Stanza 11 ... I've just been finishing, / | <i>'I've' = ability & constraint</i> |
| | | | 30 | | one of the papers // | |
| 58 | 26:40 | XM | 31 | | Stanza 12 because we had <u>this</u> research on health, eh / | <i>'We had' = ability & constraint</i> |
| | | | 32 | | <u>issues</u> with the [<i>more rapid</i>] University of Pennsylvania (mhm). // | |
| 58 | 26:45 | XM | 33 | | Stanza 13 So I've worked with them quite a lot so, // | <i>'I've' = ability & constraint</i> |
| | | | 34 | | em, I wouldn't <u>now</u> , / | |
| | | | | | 'YOU' ARE USED AS AN OUTSIDE EYE | |
| 58 | 26:50 | XM | 35 | | Stanza 14 'cause you see, the problem is, / | <i>'You see' = cognition</i> |
| | | | 36 | | when you working with something, / | <i>'You working' = state & action</i> |
| | | | 37 | | you just immerse yourself with it // | <i>'You immerse yourself' = state & action</i> |
| 58 | 26:54 | XM | 38 | | Stanza 15 ... especially if you are used as aeh, / | <i>'You are' = state & action</i> |
| | | | 39 | | as an outside eye (yes!) / | <i>'Outside eye' = metaphor of power</i> |
| | | | | | OUTSIDE REQUEST FOR SENSITIVE CONSTRUCTION | |
| | | | | | Stanza 16 | |

| Turn # | Time Stamp | Speaker | Line # | Over- lap | Contents | Comments |
|--------|------------|---------|--------|--------------|---|--------------------------------|
| 58 | 26:56 | XM | 40 | | that says, "Please come and, and, (mhm), and ... / | |
| | | | 41 | | and, and <u>really</u> , eh [pause] / | |
| 58 | 26:56 | XM | 42 | | Stanza 17 | |
| | | | 43 | [| assist us in (ah good) constructing this / | |
| | | | | | so that we are more sensitive" (good). // | 'We are' = state & action |
| | | | | | COLONIZING PERSPECTIVE IS GONE | |
| 58 | 27:00 | XM | 44 | [| Stanza 18 | |
| | | | 45 | | I think that (good), eh / | 'I think' = cognition |
| | | | 46 | | people from outside ... // | |
| | | | 47 | | these, eh, colonizing perspective , / | |
| | | | 48 | | I think for some time now, / | 'I think' = cognition |
| | | | | | has, has gone away (good). // | |
| | | | | | PEOPLE FROM U.S. AWARE THAT DATA MIGHT PUSH TOO FAR | |
| 58 | 27:16 | XM | 49 | | Stanza 19 | |
| | | | 50 | | Because I think people from United States, / | 'I think' = cognition |
| | | | | | are people that are, [pause] are <u>aware</u> | 'People are' = state & action |
| 58 | 27:26 | XM | 51 | | Stanza 20 | |
| | | | 52 | | that, by wanting to take data / | |
| | | | | | and, and all those things that might be pushing too far (yes), // | |
| | | | | | U.S. PEOPLE ASK FOR SOUTH AFRICAN VOICE | |
| 58 | 27:30 | XM | 53 | | Stanza 21 | |
| | | | 54 | | so I think because of that, / | 'I think' = cognition |
| | | | 55 | | I find more people, / | 'I find' = state & action |
| | | | 56 | | willing to say, / | |
| | | | | | "Can I get a South African voice, / | 'I get' = ability & constraint |
| 58 | 27:40 | XM | 57 | | Stanza 22 | |
| | | | 58 | | so that before we go <u>there</u> (good) / | 'We go' = state & action |
| | | | | | there was somebody that ... ". // | |
| | | | | | U.S. NAIVETY IS GONE! | |
| 58 | 27:50 | XM | 59 | | Stanza 23 | |
| | | | 60 | | You see, / | 'You see' = cognition |
| | | | 61 | | I think that, naivety, naiv ... what is ih[t]? [pause] / | 'I think' = cognition |
| | | | 62 | | That thing, of being very na-ive (yes!), / | |
| | | | 63 | | in terms of where you going to / | 'You going' = state & action |
| | | | 64 | | and you just <u>assume</u> [rapid speech:] / | 'You just assume' = cognition |
| | | | | | that you from the United States (yehs) / | 'You from' = state & action |

| Turn # | Time Stamp | Speaker | Line # | Over- lap | Contents | Comments |
|--|------------|---------|--------|--------------|--|--|
| | | | 65 | | therefore the world revolves around you? // | <i>'Around you' = state & action</i> |
| | | | 66 | | I think that thing is gone (<u>goo:d!</u>). // | <i>'I think' = cognition</i> |
| | | | | | RELIEF THAT NAIVETY IS GONE | |
| 58 | | XM | 66 | [| Stanza 24 Ai [<i>expressive Nguni sigh – or could be pronoun 'I'</i>] (I'm glad to hear | <i>DM: 'I'm glad' = state & action</i> |
| | | | 67 | [| that). | <i>'I think' = cognition</i> |
| | | | 68 | | Ja:!, I think it's gone ~ (ahahahah). // | <i>'I think' = cognition</i> |
| | | | 69 | | I think it's gone. / | <i>'I think' = cognition</i> |
| | | | | | I think so. // | <i>'I think' = cognition</i> |
| FRAME: DEBBIE COMES BACK – COLONIAL PERSPECTIVE IS NOT GONE! | | | | | | |
| | | | | | DEBBIE DOESN'T THINK COLONIAL PERSPECTIVE IS GONE | |
| 59 | 28:05 | DM | 72 | | Stanza 25 Uh, that's, that's really good.// | |
| | | | 73 | | um, / | |
| | | | 74 | | I don't actually think it's gone <u>everywhere</u> // | <i>'I don't ... think' = cognition</i> |
| | | | 75 | | but, I'm very glad that your experience has been / | <i>'I'm glad' = state & action</i> |
| | | | 76 | [| that there are institutions that <u>want</u> ~ [some?] | |

Appendix M : Outline of Xoliswa Mtose's Consent Form Talk

| | | Pronouns | | | |
|---|---|----------|--------|-----|------|
| | | I/ my | We/ us | You | Them |
| FRAME: Debbie questions appropriateness of ethics & consent forms | | 4 | | 3 | |
| EXPOSITION: Colonial perspective is gone! | | | | | |
| Xoliswa ensures culturally sensitive consent forms | | | | | |
| Stanzas 6-8: | Xoliswa put together ethics & consent forms with U.S. | 4 | 1 | | |
| Stanza 9: | Xoliswa asserts her sensitivity | 1 | | | |
| Stanzas 10-13: | Xoliswa worked with U of PA | 5 | 1 | | 2 |
| Used as an outside eye | | | | | |
| Stanzas 14-15: | 'You' are used as an outside eye | | | 5 | |
| Stanzas 16-17: | Outside request for sensitive construction | | 2 | | |
| Stanza 18: | Colonizing perspective is gone | 2 | | | |
| U.S. people aware & ask for South African voice | | | | | |
| Stanzas 19-20: | People from U.S. aware that data might push too far | 1 | | | |
| Stanzas 21-22: | U.S. people ask for South African voice | 3 | 1 | | |
| U.S. naivety & assumptions are gone! | | | | | |
| Stanza 23: | U.S. naivety is gone! | 2 | | 5 | |
| Stanza 24: | Relief that naivety is gone | 3 | | | |
| END OF EXPOSITION: U.S. naivety is gone! TOTAL | | 21 | 5 | 10 | 2 |
| FRAME: Stanza 25: Debbie comes back – colonial perspective is not gone! | | 2 | | 1 | |

Appendix N : Cross-Interview Summary—General Research

| Feature | Brendon Barnes | Amanda Gouws | Yolandi Foster | Xoliswa Mtose |
|--|---|---|--|--|
| Research context | <ul style="list-style-type: none"> Applied; disciplinary; researchers as generalists who translate cultures; need incredible skill & flexibility to unpack realities | <ul style="list-style-type: none"> Use any method if contextual & sensitive; Likert scales unnatural Rigorous research is time-consuming | <ul style="list-style-type: none"> People want to talk, tell stories, have relationships; qres exhaust participants; existing instruments → lots of qs; linguistic breadth → chaotic translation → can't explore feelings | <ul style="list-style-type: none"> Lack of methods training; supervisors promote own thesis methods & don't read w/ students; prevents fresh angles Lack statistical specialists |
| Research epistemologies | <ul style="list-style-type: none"> Interactional; not just asking questions & extracting truth | <ul style="list-style-type: none"> "Cannot leave feeling outside the door" | <ul style="list-style-type: none"> Action research: implement to understand cultural complexity | <ul style="list-style-type: none"> [not mentioned] |
| Researcher-participant interaction (RQ2) | <ul style="list-style-type: none"> People in poverty believe studies lead to tangible benefits (e.g. "you'll fix our schools") regardless of consent wording | <ul style="list-style-type: none"> Many people not numerate Low ed/literacy levels hinder honest responses/impede cognition of research interactions & surveys | <ul style="list-style-type: none"> Any research can be participatory Approach participants as experts & researchers as learners | <ul style="list-style-type: none"> Cultural process of response like learning; consider participant's discomfort when probing Researchers vulnerable to their own approaches & to how participants see them |
| Verifying meaning (RQ2) | <ul style="list-style-type: none"> [not mentioned] | <ul style="list-style-type: none"> Code rigorous categories for consistent meaning; OE quotes | <ul style="list-style-type: none"> Open, relaxed, trusting relationships allow participants to share views/say if disagree; member checking; using participants' words | <ul style="list-style-type: none"> Qual helps meaning; non-verbal cues may be linguistic/cultural artifacts Excessive probing disempowers → participants lose self/try to please |
| Implementation of ethics | <ul style="list-style-type: none"> Informed consent = "tick-the-box" Understand why/how people participate; allow more info to avoid misunderstanding when over-willing Allow less anonymity per situation Address over-researched participants Sponsors blaming people for circumstances is unethical; spend money on living conditions vs. behavioral intervention | <ul style="list-style-type: none"> Informed consent necessary but overboard; American studies require torturous essays; uneducated people not understand forms Allowing participants to cop-out when "feel uncomfortable" leads to 100 incomplete interviews because participants decide after 10 minutes they're uncomfortable; no guarantee of meaning for "not hurting feelings" | <ul style="list-style-type: none"> Get to know/build trust with people informally before consent & formal data Consent forms: purpose suitable but western implementation not; adapt to context Anonymity may be in appropriate (participants want faces & names shown) | <ul style="list-style-type: none"> Reinforcing ethics makes researchers think carefully; clarifies needs of field Ethics division comprised of researchers; student's dean talks to committee re social science needs Adapt terminology of consent forms Note insensitive aspects of process |

Appendix O : Cross-Interview Summary—Mixed Methods Research

| Feature | Brendon Barnes | Amanda Gouws | Yolandi Foster | Xoliswa Mtose |
|--------------------------------|---|--|---|--|
| Definition of QUAL/ QUAN | <ul style="list-style-type: none"> • More similar than inherently different • Disciplinary dependence | <ul style="list-style-type: none"> • <u>Quan</u>: code before data; deductive; enormous cost; rep sample re broad qs • <u>Qual</u>: code after data; OE; time-consuming for consistent codes; explains context | <ul style="list-style-type: none"> • <u>Quan</u>: concrete view; stats w/ cause & effect, testing, & confirming or disconfirming; relationship • <u>Qual</u>: gives deep understanding, perception, personal meaning | <ul style="list-style-type: none"> • Different worlds • <u>Quan</u>: validate/check reliability; #s & values can “check & balance” • <u>Qual</u>: spoken words & experiences from which make meaning, e.g. stories |
| Definition of MM (RQ1) | <ul style="list-style-type: none"> • More political than technical • Big business | <ul style="list-style-type: none"> • Combination of quan & qual; triangulation compares results or data sets w/ different purposes | <ul style="list-style-type: none"> • Combining QUAL & QUAN to enrich results. RQ determines whether simultaneous or one before other | <ul style="list-style-type: none"> • Putting qual & quan together through philosophical framework or towards the end |
| Perceptions | <ul style="list-style-type: none"> • Love-hate; solves all problems; difficult, creates problems | <ul style="list-style-type: none"> • Suspicious “white western import” • No other way | <ul style="list-style-type: none"> • Emerging methodology • Mostly advantages | <ul style="list-style-type: none"> • “A stranger” due to anxiety of dealing with #s & lack of QUAN confidence |
| Reasons/benefits | <ul style="list-style-type: none"> • Explain complex context; funders expect; qual interprets situations for funders; shakes up quan/qual meaning | <ul style="list-style-type: none"> • Answer broad Qs; understand context | <ul style="list-style-type: none"> • Gives many angles & nuances, more complete picture; culturally friendly; suits daily reality | <ul style="list-style-type: none"> • Quan & qual enrich & complement each other; richer, more rigorous understanding |
| Dominance | <ul style="list-style-type: none"> • Psychology: QUAN | <ul style="list-style-type: none"> • Political science: QUAL; stigma against quan due to ignorance | <ul style="list-style-type: none"> • Ed/ed psychology: QUAL to account for literacy & language difficulties | <ul style="list-style-type: none"> • QUAL (for herself & for her “field”) |
| Academic formation | <ul style="list-style-type: none"> • Lack opportunity to study an approach (quan, qual, MM) in depth • Ask vs. tell students re quan vs. qual | <ul style="list-style-type: none"> • Students need to journal; feel effect of topics, & have time to understand processes; less broad quan than U.S. | <ul style="list-style-type: none"> • [not mentioned] | <ul style="list-style-type: none"> • Exposure to quan, qual, & MM is unified; supervisors lack MM confidence/practice so discourage |
| Cultural knowledge (RQ3 & RQ4) | <ul style="list-style-type: none"> • North: political knowledge economy; publications: methods w/out theory or application • South: “very, very, very few voices” in methods literature | <ul style="list-style-type: none"> • Oral storytelling=only indigenous method; community involvement → objectivity • Nat’l Research Foundation “stupid,” not for indigenous complexity | <ul style="list-style-type: none"> • West: structure research because system works • SA: too many cultures & contexts; one size not fit all; incorporate approaches other than qres for balanced view | <ul style="list-style-type: none"> • Colonizing gone; hybrid worlds • U.S.: academics no longer think world revolves around them; write clearly; “do methods” • SA: lack confidence in quan |
| MM misuse | <ul style="list-style-type: none"> • Funding seeks to demonstrate good work; methods = end in themselves; viewing qual/quant as separate studies | <ul style="list-style-type: none"> • [not mentioned] | <ul style="list-style-type: none"> • [not mentioned] | <ul style="list-style-type: none"> • Dropping MM like dropping a name • Seeing disintegrated quan & qual • Difficulty mastering quan & qual |
| MM needs | <ul style="list-style-type: none"> • Cease paradigmatic war • RQs for greater good • Design studies for combining • Add to vs. regurgitate lit; draw on corresponding debates • “Incredible skill & flexibility” | <ul style="list-style-type: none"> • Attend to ways in which develop & apply methods | <ul style="list-style-type: none"> • Treat RQs flexibly; allow fluid & dynamic design & process; remain open to finding out other things; • Serve SA needs re language & lack of familiarity with questionnaires • May need to change implementation of existing instruments | <ul style="list-style-type: none"> • Grounding in MM: master quan, qual, & how work together • Talk deeply re credibility/ reliability • Avoid rushing hastily into the field • “Unpack” vs. asking research questions • Adapt terminology of instruments |

Appendix P : Cross-Interview Discursive Analysis

| Gee (2014a) Tools | Brendon Barnes | Amanda Gouws | Yolandi Foster | Xoliswa Mtose |
|--|---|---|---|---|
| Identity, Language, and Relationships | | | | |
| Identities building | <ul style="list-style-type: none"> MM = political ID Put 2 discourse analysts in a room & “see the fight that happens” | <ul style="list-style-type: none"> Qual & quan criticize each other Different disciplines = different leanings toward quan or qual | <ul style="list-style-type: none"> [not mentioned] | <ul style="list-style-type: none"> SA participants are more self-questioning, less arrogant than US |
| Situated meaning | <ul style="list-style-type: none"> [not mentioned] | <ul style="list-style-type: none"> [not mentioned] | <ul style="list-style-type: none"> Developed world MM: recipe=cake; SA: no recipe | <ul style="list-style-type: none"> Culture is no longer simple |
| Intertextuality (small <i>d</i>) | <ul style="list-style-type: none"> Alan Bryman, Kevin Durrheim & Linda Richter | <ul style="list-style-type: none"> Johann Mouton | <ul style="list-style-type: none"> John Creswell (“John’s book!”) | <ul style="list-style-type: none"> John Creswell, Kevin Durrheim |
| Social languages (who does what with research) | <ul style="list-style-type: none"> <i>Specialist</i>: kinds of qs → kinds of answers; labels “clump everyone into methodological baskets”; “I’m a mixed methodologist” = divisively recreates qual/quant debate | <ul style="list-style-type: none"> <i>Vernacular</i>: Many people not numerate; Likert scales unnatural | <ul style="list-style-type: none"> <i>Vernacular</i>: African people talk & tell stories; lack history with books & qres; answer w/out understanding → exhausting; lack common lang <i>Specialist</i>: translate/back-translate= chaotic; let participants ‘do’: actions, workshops, & fun activities | <ul style="list-style-type: none"> <i>Vernacular</i>: think in 1 lang, answer in another; differing Englishes constrain q answering <i>Specialist</i>: avoid interpreting non-verbal language across cultures |
| ↓ | | | | |
| Relationships building | <ul style="list-style-type: none"> Research is interactional Northern researchers treat African researchers like “glorified field workers” | <ul style="list-style-type: none"> Research takes time Informed consent essays torturous | <ul style="list-style-type: none"> Relationality → Trust → Ethics Participants are experts Informal encounters → informed consent | <ul style="list-style-type: none"> Avoid haste; probe sensitively in cultures that express self-doubt Technology has minimized gap between west & east |
| ↓ | | | | |
| Politics, Economies, and Knowledge | | | | |
| Politics building | <ul style="list-style-type: none"> All research political Quickly define situations; get results | <ul style="list-style-type: none"> [not mentioned] | <ul style="list-style-type: none"> Asking for stories → overcome political barrier of oppression | <ul style="list-style-type: none"> [not mentioned] |
| ↓ | | | | |
| Economies building | <ul style="list-style-type: none"> MM: “white western import” Game: spend to demo work Enormous money on study vs. upgrading living conditions | <ul style="list-style-type: none"> Incentives → answers, e.g. food vouchers Team translation & back-translation prohibitively expensive Cost of rep sample prohibitive | <ul style="list-style-type: none"> Resources for team approaches to translation are problematic; may be possible & ideal when participants own project | <ul style="list-style-type: none"> [not mentioned] |
| ↓ | | | | |
| Knowledge-building | <ul style="list-style-type: none"> Knowledge economy/big business Funders: determine content & MM Methods, knowledge inseparable MM journals: few southern voices Disciplinary cultures → knowledge Methods as end vs. means to end Outside researchers ask wrong qs | <ul style="list-style-type: none"> Standpoint theories → indigenous knowledge/class disparities Quan separates feeling/thought; community involvement → objectivity | <ul style="list-style-type: none"> African people want to be known Be flexible with RQ; be open to finding out other things | <ul style="list-style-type: none"> Simplicity & humility → knowledge → empowers The more you “drink” from knowledge, the more humble you become/need to become |
| Big <i>D</i> (intertextuality & wrap-up) | <ul style="list-style-type: none"> MM: a divisive label Northern funders/researchers ask wrong questions about SA life | <ul style="list-style-type: none"> Cannot use methodology for the sake of methodology | <ul style="list-style-type: none"> Western anonymity & confidentiality → participants not listening | <ul style="list-style-type: none"> Worlds come together in ways “neither here nor there,” influence on methods not culture-specific |

Appendix Q : Corpus Books⁴⁰

| | Mouton and Marais (1988) | Mouton (1996) | Terre Blanche and Durrheim (1999) / Terre Blanche et al. (2006) | de Vos (2002b) / de Vos, Strydom, Delpont, et al. (2011) | Maree (2007) / Revised (2010) | Maree (2012) | Wagner et al. (2012) | Bless et al. (2013) | Wissing (2013b) |
|--|--|---------------------------------|---|--|---|---|---|---|---|
| Book Title | • Basic concepts in the methodology of the social sciences | • Understanding social research | • Research in practice: Applied methods for the social sciences | • Research at grass roots: For the social sciences and human service professions | • First steps in research | • Complete your thesis or dissertation successfully: Practical guidelines | • Doing social research: A global context | • Fundamentals of social research methods: An African perspective | • Well-being research in South Africa |
| 1 st Editor Affiliation | • Human Sciences Research Council | • U of Stellenbosch | • U of South Africa | • (former) Rand Afrikaans U | • U of Pretoria | • U of Pretoria | • U of Pretoria | • Independent consultant | • North-West U (SA) |
| 1 st Editor Discipline | • Sociology | • Sociology | • Critical Psychology | • Social Work | • Educational Psychology | • Educational Psychology | • Applied Psychology | • Human Resources | • Clinical Psychology |
| Book Type | • Monograph | • Monograph | • Edited volume | • Edited volume | • Edited volume | • Edited volume | • Edited volume | • Monograph | • Edited volume |
| Publisher | • Pretoria, SA: Human Sciences Research Council | • Pretoria, SA: Van Schaik | • Cape Town, SA: U of Cape Town Press | • Pretoria, SA: Van Schaik | • Pretoria, SA: Van Schaik | • Cape Town, SA: JUTA | • Berkshire, UK: McGraw-Hill Higher Education | • Cape Town, SA: JUTA | • Dordrecht, NL: Springer |
| Qual & quan or MM chapter 1 st author | • Mouton / Human Sciences Research Council | • Mouton / U of Stellenbosch | • Durrheim / U of KwaZulu-Natal | • de Vos / (former) Rand Afrikaans U | • Jansen / U of Pretoria • Ivankova / U of Alabama | • Morgan / U of Johannesburg • Seabi / U of Witwatersrand • Perry / Cleveland State | • | • Bless / Independent consultant | • Maree / U of Pretoria • Thekiso / North-West U • Kirsten / North-West U |

⁴⁰ Items reference terms related to *combined*, *mixes methods*, *multi-method*, or *qualitative* and *quantitative* approaches.

Appendix R : Journal Articles Providing Mixed Methods Syntheses

| | Ngulube et al. (2009) | Barnes (2012) |
|--------------------------|---|---|
| Aim | <ul style="list-style-type: none"> To explore use & prevalence of MMR in library & info science research in SA | <ul style="list-style-type: none"> To develop a nuanced understanding of MM lit in SA psychological research |
| Approach | <ul style="list-style-type: none"> Content analysis | <ul style="list-style-type: none"> Analyzes methodological characteristics of articles in SA Journal of Psychology 2005-2010; SA research texts; experiences teaching & supervising research |
| QUAL/ QUAN definitions | <ul style="list-style-type: none"> <u>Quan</u>: positivist, objective, context-free; can determine reliability & validity <u>Qual</u>: naturalistic, constructivist or interpretivist; locally & socially constructed reality; context-sensitive; knower & known inseparable; researcher values influence outcome | <ul style="list-style-type: none"> <u>Quan</u>: has complied with or been neutral about racism & gender ideologies <u>Qual</u>: method of choice for critical & transformative research |
| MM descriptions | <ul style="list-style-type: none"> New movement, not new design; historically blended, hybrid, integrative, multimethod, multiple methods, triangulated, ethnographic residual Integrating quan & qual Fully mixed: state qual & quan objectives | <ul style="list-style-type: none"> Mixed methods, mixed methods research |
| MM paradigms | <ul style="list-style-type: none"> Following paradigm wars leads to a “paradigmatic hangover” (p. 106). Pragmatism is not a paradigm | <ul style="list-style-type: none"> Enquiry with own set of philosophical, methodological & practice guidelines SA psych: interpretivism promotes incommensurability Pragmatism’s intersubjectivity rejects dualism & theoretically works abductively Transformative stance acknowledges pervasive discrimination & oppression, poses researchers’ obligation to understand & challenge processes that maintain status quo (Mertens, 2010a) |
| MM purposes / advantages | <ul style="list-style-type: none"> Answer RQs holistically; adds insight, triangulate, complement, use results from 1 stage to develop another, seek contradictions, extend breadth & scope Heal qual & quan rift; Strengths overcome deficiencies | <ul style="list-style-type: none"> Understand magnitude & participant perceptions of SA social justice; transformatively address race & gender issues; develop locally relevant psychometric instruments & interventions when western models inappropriate; overlapping strengths add value; understand how much & why |
| Designs | <ul style="list-style-type: none"> Sequential, concurrent, & transformational 4/5 triangulate ¾ studies qual → quan, most to develop qre & triangulate Qual dominance | <ul style="list-style-type: none"> Per sequence, priority, & stage of mixing; sequential explanatory: pursue unexpected findings (quan priority); sequential exploratory: develop quan (priority) or answer qs from qual (priority); concurrent triangulation: single phase to test for consistent findings; concurrent nested: mix in 1 phase w/ clear dominance to understand phenomenon, e.g. multiple strata/levels |
| MM process | <ul style="list-style-type: none"> [not mentioned] | <ul style="list-style-type: none"> Transdisciplinary dialogue |
| MM quality | <ul style="list-style-type: none"> [not mentioned] | <ul style="list-style-type: none"> Legitimation most practical: sample, inside-outside, weakness minimization |
| Influences on MM | <ul style="list-style-type: none"> [not mentioned] | <ul style="list-style-type: none"> Influence on RQs (& gaps in lit): disciplinary trends; practicality; audience; funder imperatives; researcher preference, personal interests, philosophy, political stance |
| Stated problems/needs | <ul style="list-style-type: none"> <u>Problems</u>: not appreciating or stating challenges; only analyzing/interpreting 1 approach; co-present w/out mixing (most studies); not stating purpose of mixing; not or partially integrating data; few good at quan & qual <u>Needs</u>: harmoniously cross epistemologies, disciplines, teams, power, & money; postmodernists deconstruct mixing; determine why SA not use MM more; research & publish integrated methods | <ul style="list-style-type: none"> <u>Problems</u>: too many MM definitions, purposes, & overarching topics; promoting MM as better than mono methods is as deterministic as paradigm wars MM opposes; conceptualizing quan & qual separately; no consensus re exemplars <u>Needs</u>: engage w/ MM philosophical lit; provide mixed RQ & rationale for mixing; mix at all levels & stages; use MM designs; assess quality of research; transformative agenda in SA psychological research has developed slowly |