Reflection/Commentary on a Past Article: “Verification Strategies for Establishing Reliability and Validity in Qualitative Research”

http://journals.sagepub.com/doi/full/10.1177/160940690200100202

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“Verification strategies for establishing reliability and validity in qualitative research” is one of the International Journal of Qualitative Methods’ (IJQM) most downloaded articles over the past 18 years. To date, it has been cited in 4,398 articles tracked in Google Scholar. At the time of its publication, in IJQM’s Volume 2 in 2002, there was still lively debate about the role and nature of reliability and validity in qualitative inquiry. This was a time in which the seminal work of Guba and Lincoln in the 1980s had been sufficiently disseminated to several generations of qualitative researchers. Discussion as to what rigor ought to be—its dimensions, parameters, and terminology—gradually obscured a subtle but important shift in the way qualitative researchers conceptualized rigor—from integral processes implemented by the researcher to standards and criteria utilized by the reader. The marginalization of reliability and validity—language familiar to researchers using quantitative methods—and replacement with qualitative-specific criteria, goals, and standards for rigor, each with their own terms to suit specific contexts, had created a confusing and unworkable landscape in which criteria and processes for establishing rigor became less clear.

Our group, which had come together in the early 2000, was comprised of Jan Morse, three postdoctoral fellows (J. S., M. M., and K. O.), and a new assistant professor (M. B.). Each of us came with similar problematic notions of trustworthiness that, on the surface, appeared to reflect the principles of qualitative inquiry processes, but which in fact did little to support the development of strategies the researcher could use to incrementally construct a rigorous outcome. In our various subfields of health care, we each encountered the rise of guidelines, standards, and checklists being adopted with the intent to itemize qualitative inquiry.

The conceptualizing of this article was a key mentoring experience for us. There were two primary outcomes: First, the terms reliability and validity were not the sole purview of quantitative research. We concluded that reliability and validity were simply concepts that were equally applicable to qualitative inquiry. Reliability in qualitative research is rooted in the idea of data adequacy, which makes it possible to show consistent support for one’s analysis across participants. Validity, on the other hand, is related to data appropriateness, which makes it possible to provide an accurate account of the experiences of participants within and beyond the immediate context. The second outcome was a return to the fundamental responsibility of the researcher for the continual checking and adjustment of research processes (i.e., verification) to ensure that the results are robust, rather than a justification of the limitations and deficiencies written after the study is completed. The responsibility for assessing rigor is in the purview of the researcher, not the reader.

This article was not easy to write. Morse’s ideas were far ahead of the rest of the qualitative world. Her concern was not on the need for qualitative researchers to rationalize the uniqueness of their work through new terminology but to understand how verification strategies could be used to assure rigor in qualitative research. This approach presented an alternative conceptualization of rigor which supported principles of qualitative inquiry and the epistemological and ontological assumptions embedded in the research question that initially guide selection of design and data collection strategies but

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which continue to actively ensure methodological congruence and certainty that the research process is rigorous. Verification strategies are inherently built into research processes and are ultimately pragmatic—not a matter of meeting a standard in some type of checklist but a process of continually verifying and adjusting to ensure issues are identified and corrected as the research develops and the theory evolves.

As each of us has gone on to our respective academic careers, this article remains a central resource for the qualitative community. As we gain increasing experience with varieties of qualitative inquiry, our understanding of verification strategies becomes evident. Morse (2018) has since extended this approach by linking appropriate strategies to data types used within each qualitative method. Barrett has worked with colleagues (Zachariadis, Scott, & Barrett, 2013) to extend our understanding of validity in qualitative inquiry by drawing on the ontological assumptions of critical realism for mixed-methods research. Mayan, Olson, and Spiers have all taught rigor in qualitative inquiry in Canada and in other countries using the verification strategies they found that they work well with a wide variety of designs and research topics. Mayan finds as a community-based researcher, whose verification strategies align well with this approach.

The key debates about rigor have not entirely abated, despite a growing recognition, generated by increasing insight and practice, and pushed further by the rise of mixed methods. Indeed, even today, researchers are proposing new terms to cover the concepts that were established decades ago to demark rigorous work. Nevertheless, it is imperative that we adhere to the fact that in qualitative inquiry, the onus is on the researcher for achieving quality, is embedded in the process of inquiry, and must not be diluted by the application of external (and often irrelevant—and damaging) “standards.”

Declaration of Conflicting Interests
The author(s) declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

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