Comparisons of Adaptations in Grounded Theory and Phenomenology: Selecting the Specific Qualitative Research Methodology

Ivan Aldrich Urcia

Abstract
The most widely used qualitative research methodologies are grounded theory and phenomenology. Both methodologies have expanded over time to several adaptations aligning with different paradigms, complex philosophical assumptions, and varying methodological strategies. Novice researchers either mistakenly mix the strategies of both methodologies or blend specific assumptions of methodologies’ different adaptations. Choosing the appropriate methodology and the specific adaptation in line with research inquiry and congruent with the researchers’ worldview is crucial in undertaking rigorous qualitative study. To date, there is limited literature that compared and contrasted the varying philosophical underpinnings of the two methodologies’ different adaptations. The purpose of this methodological paper is to provide a general overview of the two methodologies’ different adaptations to illustrate how they differ in approach. By immersing into the origins, philosophical assumptions, and utility of the two methodologies’ adaptations, novice researchers will develop a general overview of the foundations that support those specific adaptations. Finally, the considerations in choosing a specific adaptation of a methodology are discussed and applied by underpinning a research question on the care experiences of patients in the Accountable Care Unit. Thus, this methodological paper may assist novice researchers in deciding which specific adaptation of the two methodologies is the appropriate qualitative methodology for their research.

Keywords
Accountable Care Unit, Constructivist Grounded Theory, Grounded Theory, Phenomenology, Phenomenological Approach, Qualitative Research Methodology

Introduction
Qualitative research methodologies are the specified philosophical and theoretical frameworks applied in a systematic inquiry into social phenomena in a natural setting (Creswell & Poth, 2018). The most widely used qualitative research methodologies are grounded theory and phenomenology (Gelling, 2011; Goulding, 2005; Padgett, 2017; Strandmark, 2015). Grounded Theory (GT) is a design of inquiry where subjective data collection and conceptual analysis undergo an emergent iterative process to develop a theory (Denzin & Lincoln, 2018). On the other hand, Phenomenology, as a research methodology, is referred to as Phenomenological Approach (PA) in this paper. PA seeks to deeply understand a phenomenon’s fundamental dimensions based on the inner essence and structure of participants’ lived experiences (Burns & Peacock, 2019; Munhall, 2012; van Manen, 2016).

Over the years, qualitative methodologies evolved with different adaptations. Instead of variants, the term adaptations is used in this paper to describe the specific types or versions of overarching qualitative methodologies. Both GT and PA have expanded over time to several adaptations aligning with different paradigms, complex philosophical assumptions, and methodological strategies. Regrettably, some qualitative
research studies referred to one of these two methodologies simply as a general methodology and did not stipulate the specific adaptation employed. For example, Dowling (2007) reviewed different PAs and cited studies with weak phenomenological applications that do not reflect the specific adaptations. Some studies claimed using GT as a methodology but did not produce a core category, conceptual model, a theoretical framework, or a substantive theory (Strauss & Corbin, 2015). Some novice researchers also create methodological messes by either amalgamating both GT and PA’s strategies (Baker et al., 1992) or blending specific assumptions of differing methodological adaptations. This violation of assumptions results in a weak research design and fragmented study, eroding credibility (Richards & Morse, 2013). The researcher’s choice of an appropriate methodology and specific adaptation that fits their belief about the nature of reality is crucial in undertaking rigorous qualitative research (Mills et al., 2006).

Some literature distinguished GT and PA as general methodologies but did not illustrate the different adaptations, corresponding assumptions, and matching strategies (Marjan, 2017; Reiter et al., 2011; Starks & Trinidad, 2007; Strandmark, 2015). To the best of my knowledge, there is limited work that has compared these methodologies’ different adaptations to the level of their philosophical underpinnings, which have significant impact on conducting qualitative research. The purpose of this methodological paper is to provide a general overview of the distinct adaptations of GT and PA, illustrate their similarities and differences in approach, and narrow down the discussion by formulating arguments in choosing a specific adaptation of a methodology. To demonstrate selecting a specific adaptation conclusively, I will draw upon my research interest to understand patients’ care experiences in the Accountable Care Unit (ACU). The ACU is a healthcare delivery model converted from a traditional ward into a unit focused on interdisciplinary collaboration. By immersing into the origins, philosophical assumptions, and utility of the two methodologies’ adaptations, novice researchers can convey the foundations that support the appropriate and specific adaptation of a methodology for their proposed area of research. Thus, this paper contributes to the existing literature by guiding novice researchers in deciding which specific adaptation of qualitative methodology best fits their research.

This paper highlights GT and PA’s fundamental aspects: origins, philosophical assumptions, methodological strategies, usefulness, outcomes, strengths, limitations, and applications to research inquiry. The paper has five parts. First, the paper begins broadly by outlining GT and PA’s historical, ontological, epistemological underpinnings, and adaptations. Second, both methodologies’ foundations and strategies are examined based on their similarities and differences. Third, the utility and outcome of these methodologies to health and nursing inquiry are illustrated. Fourth, GT and PA’s advantages and drawbacks are presented. Fifth, the guidelines in choosing a specific adaptation of the two methodologies are discussed by underpinning a research topic.

**Historical, Ontological, and Epistemological Underpinnings**

Both GT and PA have different adaptations that should not be referred to interchangeably. The adaptations lie in a spectrum based on the assumption of worldviews and philosophical underpinnings (Richards & Morse, 2013). Although there is a risk of drawing a fine line on the adaptations’ distinctions because of the similarities and overlaps in their highly abstract principles, I will attempt to compartmentalize them into paradigms. The principles can be grasped and identified by understanding paradigms, ontology, epistemology, and methodology. Paradigms are essential sets of guidelines that inform researchers’ actions from which they align (Guba, 1990, as cited in Creswell & Poth, 2018). The term ontology refers to the worldview on the nature or form of existence, truth, and reality (Creswell & Poth, 2018; Lincoln et al., 2018). Epistemology is the belief in how knowledge is acquired and the justification of knowledge development (Creswell & Poth, 2018; Lincoln et al., 2018). A methodology is a set of procedures and methods of knowledge development that are crucial in providing direction to a study (Creswell & Poth, 2018; Lincoln et al., 2018). Novice researchers should recognize their worldview on the nature of reality and select the paradigm aligning to their beliefs to achieve a rigorous research GT design (Mills et al., 2006). The paradigms are contingent on abstract principles’ school of thought, namely positivist, post-positivist, interpretivist, and critical paradigms, which are also attributed to the historical origins of qualitative research (Creswell & Poth, 2018; Denzin & Lincoln, 2018).

Based on the historical account of qualitative research by Denzin and Lincoln (2018), from 1900 to 1950, the traditional standard is positivism, also known as the scientific paradigm and commonly associated with quantitative research. Positivism has a realist ontology (a worldview that one reality exists) and objectivist epistemology (believing in knowledge existence independent of the researcher’s perspective) (Lincoln et al., 2018). During the modernist phase (1950–1970), some scholars moved away from positivism and embraced post-positivism (Denzin & Lincoln, 2018). Post-positivism has critical realist ontology (truth is probable through a critical examination of the context of social realities) and has modified objectivist epistemology that truth can be approximated with interactions with research participants kept at a minimum to retain objectivity in determining causative mechanisms (Creswell & Poth, 2018; Lincoln et al., 2018). In the 21st century, there is an increasing influence of interpretivism or interpretive paradigm. This paradigm is often described with a relativist ontology (a worldview that multiple realities exist) and a subjectivist epistemology that truth and meaning are shared subjectively among people (Creswell & Poth, 2018). Under the umbrella of
interpretive paradigm, constructivism has the same relativist ontology but has a different epistemology rooted from social constructivism (where reality is socially co-constructed by the researcher and participants) that is interchangeably used with interpretivism (Creswell & Poth, 2018; Lincoln et al., 2018; Racher & Robinson, 2003). Due to this blurring of boundaries, interpretivism and constructivism are considered in one paradigm in this paper. Although post-modernism, feminism, and critical theory are valuable paradigms that offer varying assumptions of GT and PA, this paper will limit the discussion to the adaptations that fall into post-positivism, interpretivism, and constructivism, shown in Table 1. These adaptations are the most widely used among international health and nursing research.

**Grounded Theory**

The GT approach uses a systematic and comparative method of analysis to understand patterns of social processes (actions, behaviors, and interactions) over time to generate a theory (Charmaz, 2014; Glaser & Strauss, 1967; Strauss & Corbin, 2015). This methodology takes influence from symbolic interactionism (Charmaz, 2014; Glaser & Strauss, 1967; Strauss & Corbin, 2015). Symbolic interactionism, ingrained from pragmatism (useful and practical approach), is the idea that reality is symbolically negotiated and interpreted between complex networks of people interacting with one another (Blumer, 1969). The underlying assumption is that people act based on their perceived meaning of experiences of social interactions through language, behavior, and communication (Charmaz, 2014; Glaser & Strauss, 1967; Strauss & Corbin, 2015). Through pragmatic considerations, grounded theorists agree that the patterns of participants’ social interpretation of a phenomenon can be understood as reasonable knowledge through abduction and can be translated into theory grounded within data.

The intellectual roots of GT originated from American sociology over five decades ago during the modernist era, a period where there was a shift in the research paradigm from positivism to post-positivism (Charmaz, 2014; Denzin & Lincoln, 2018). In 1967, sociologists Barney Glaser and Anselm Strauss, the founders of GT, published their seminal work entitled “The discovering of grounded theory: Strategies for qualitative research.” This book demonstrated the first version of GT that stemmed from the founders’ analytic ideas in exploring death and dying, which demonstrated post-positivism in their qualitative research approach. After GT’s inception, Glaser and Strauss separated their paths and returned to their philosophical origins. The former had positivistic and quantitative methodological expertise, while the latter had interpretive and symbolic interactionism sensibilities (Charmaz, 2014; Rieger, 2019). The differences between the two scholars pivoted the emergence of different GT adaptations that diverged following their ontological and epistemological underpinnings (Charmaz, 2014).

Glaser (1992) claimed that his GT is epistemologically neutral, that Glaserian GT could be positioned with any discipline. However, various scholars agreed that Glaser’s classical GT guidelines align with realist ontology and objectivist epistemology (Duchscher & Morgan, 2004; Rieger, 2019; Singh & Estefan, 2018). Glaserian GT is based upon the premise that reality is already existing in the world and that reality can be observed objectively to discover theory. Because Glaser’s GT has ontological and epistemological stances leaning toward positivism as cited by Charmaz (2014), Glaserian GT sits on the extreme spectrum of the post-positivist paradigm. Glaser’s underlying assumption of GT proposes that truth transpires from data gathered and that researchers are objective observers (Glaser, 1992). He asserted that preconceived notions such as the researcher’s knowledge and experiences might affect the authenticity of data outcomes. This notion implies that researchers should strictly adhere to Glaserian GT procedure of being objective during data collection and analysis. Meanwhile, Strauss had a new partnership with Juliet Corbin and pursued GT with a relativist ontology that emphasizes the existence of multiple realities. Strauss and Corbin (2015) GT evolved from the traditional paradigm of Glaser and Strauss with epistemological stances

| Paradigm                  | Ontology                  | Epistemology               | Grounded Theory             | Phenomenology                         |
|---------------------------|----------------------------|----------------------------|-----------------------------|---------------------------------------|
| Post-positivism           | Critical realist ontology | Modified objectivist epistemology | Glaserian GT (Glaser, 1992) | Husserian phenomenology (Husserl, 1913/2012) |
| Interpretivism/Constructivism | Relativist ontology       | Subjectivist epistemology | Glaser and Strauss’s GT (Glaser & Strauss, 1967) | Giorgi’s descriptive phenomenological psychological method (Giorgi, 2009) |
|                           |                            |                            | Strauss and Corbin’s GT (Strauss & Corbin, 2015) | Heideggerian phenomenology (Heidegger, 1962/2019) |
|                           |                            |                            | Charmaz’s constructivist GT (Charmaz, 2014) | Benner’s PA (Benner, 1994), Munhall’s PA (Munhall, 1994, 2012) |
|                           |                            |                            |                             | van Manen’s PA (Van Manen, 2014, 2016) |
|                           |                            |                            |                             | Smith’s interpretative phenomenological analysis (Smith, et al., 2009) |
|                           |                            |                            |                             | Gadamer’s hermeneutic phenomenology (Gadamer, 1998) |
of subjectivism that meanings are shared subjectively by researcher and participants (Duchscher & Morgan, 2004; Rieger, 2019; Singh & Estefan, 2018). Contrary to Glaserian GT, they believed that being objective observers is unachievable. Based on this premise, Strauss and Corbin’s GT with ontological and epistemological stances make their adaptation fall into the interpretive paradigm. However, in a later publication, Corbin changed her view and explicitly acknowledged her close alignment to constructionism (Strauss & Corbin, 2015).

Lastly, Kathy Charmaz, a student of Glaser and Strauss, advanced interpretive GT by using a constructivist approach (Mills et al., 2006). Charmaz (2014) offered practical and flexible guidelines in conducting constructivist’s adaptation of GT. From Charmaz’s (2014) perspective, researchers’ prior knowledge about data will produce a rich-detailed and contextual understanding upon further interactions with research participants. Constructivist GT creates co-constructed knowledge, where researchers’ disciplinary perspective plays an active role in constructing theoretical knowledge in partnership with participants (Charmaz, 2014).

Phenomenology and Phenomenological Approach

Novice researchers should recognize the boundaries between phenomenology as a philosophy and PA as a research methodology (Dowling, 2007). One of the major distinctions of PA over GT is the foundational background of PA with philosophy. The intellectual roots of the term phenomenology originated from European philosophical texts (Dowling, 2007; Moran, 2000). The term was adopted by Edmund Husserl inspired by Franz Brentano in the creation of transcendental philosophical thinking, now known as phenomenology (Dowling, 2007; Moran, 2000). Phenomenology as a philosophy cannot be simply defined due to very complex philosophical foundations but can be linked to the science of essential being of human lived experience as it appears to consciousness or to the things themselves (Husserl, 1913/2012). The development of phenomenology was in response to the dominant positivist views during Husserl’s time (Burns & Peacock, 2019; Laverty 2003; Munhall, 2012). This paradigm shift is similar to Glaser and Strauss’s (1967) GT development moving away from positivism. On the other hand, phenomenology as a methodological approach is coined in this paper as PA, which can offer a descriptive and interpretive form of inductive research from which the inquirers discover the lived experience of people (Munhall, 2012). PA also collects rich data that permit readers to have significant insights into the lived experience of a phenomenon (Corben, 1999). In contrast to GT, PA is not used to conceptualize or generate theories but an ideal methodology to deeply understand the lived experiences of people.

Husserl proclaimed himself a positivist (Dowling, 2007), but since he departed from the scientific paradigm, his adaptation of phenomenology leaned towards post-positivism (Koch 1999; Moran, 2000; Racher & Robinson, 2003). Husserl (1913/2012) recognized that reality exists independent of one’s mind and that reality can be critically examined based on lived experiences and pure consciousness. This view equates to critical realism that truth is observable and approximated from contextual social realities in a human being’s consciousness. Husserlian phenomenology focuses on the epistemological basis in understanding the essence of persons’ lived experiences as a crucial source of knowledge (Dowling, 2007; Husserl, 1913/2012; Koch 1999). The requirements to acquire knowledge based on pure consciousness, essences, intentionality, and bracketing (Husserl, 1913/2012) are similar to modified objectivist epistemology. As a philosophy, Husserlian phenomenology objectively examines the primeval essence of a phenomenon that appears immediately to consciousness and free from a cultural context (Dowling, 2007; Husserl, 1913/2012; van Manen, 2016). Husserl argued that concrete description of reality is achieved through the principle of intentionality or directing one’s mind to an object or phenomenon (Husserl, 1913/2012; Koch, 1999; Laverty, 2003; Van Manen, 2014).

Husserlian phenomenology focuses on the pure description without offering interpretations (Corben, 1999; Dowling, 2007; Husserl, 1913/2012). This approach of Husserl of modified objectivism is somewhat similar to Glaserian GT. To achieve objectivism, Husserl established phenomenological reduction in the form of epoche or bracketing (suspending preconceived perceptions, assumptions, and biases about a phenomenon) to clearly understand the essence of lived experiences and world structures (Dowling, 2007; Giorgi, 2009; Husserl, 1913/2012; Koch, 1999; Laverty, 2003; van Manen, 2016). The technique involves being unprejudiced in investigating phenomena as they appear to the mind; thus, paving a way to precise descriptions uninfluenced by researchers’ preconceptions (Dowling, 2007; Giorgi et al., 2017). Husserlian phenomenology inspired Amedeo Giorgi (1985) in developing PA with a focus on psychology known as the descriptive phenomenological psychological method (DPPM). Giorgi (2009) adopted Husserlian phenomenological assumptions to study human lived experience and behavioral phenomena. Although there are few modifications from Husserlian phenomenology, the DPPM comprised the same interlocking assumptions of description, reduction, and essence (Giorgi, 2009; Giorgi et al., 2017).

Martin Heidegger, Husserl’s mentee and successor, argued the impossibility of bracketing presuppositions and achieving pure descriptions through observation (Frechette et al., 2020; Heidegger, 1962/2019; Laverty, 2003). Advancing phenomenology with an ontological turn, Heidegger asserted that consciousness is undetached from the world but is rather with Dasein or situated human existence of being-in-the-world (Heidegger, 1962/2019; Moran, 2000). The meanings are constructed by day-to-day individual lived experiences of objects, space, time, embodiment, and interaction with other human beings (Heidegger, 1962/2019; Moran, 2000). Hence,
the philosophical foundation of Heideggerian phenomenology can be considered based on the worldview that multiple reality exists and that knowledge is created and shared subjectively. Accordingly, Heideggerian phenomenology falls under an interpretive paradigm similar to Strauss and Charmaz’s GT adaptations. Furthermore, Heidegger highlighted that all descriptions are already interpretations (Burns & Peacock, 2019; Carman, 2006). (Heidegger, 1962/2019) emphasized lived experience through a hermeneutic process (interpreting meaning) based on the four lived existential life world concepts: spatiality, corporeality, temporality, and relationality (Munhall, 2012; Van Manen, 2017). Consequently, when phenomenological research focuses on interpreting the meaning of a phenomenon, the PA is considered hermeneutic (Dowling, 2007). Following hermeneutic tradition, researchers employing interpretive PA reflect rather than bracket their preconceptions and work together with participants to find underlying meanings and contextual elements that shape a phenomenon (Bynum & Varpio, 2018). With a hermeneutic circle, interpretive PA also assumes the co-creation of knowledge between researchers and participants (Burns & Peacock, 2019), signifying Heideggerian phenomenology falls under the interpretive-constructivist paradigm (Amels, 1996).

Based on Heideggerian phenomenology, several methodologies emerged. The conceptualization of interpretive phenomenology predominantly influenced the PA adaptations of Benner (1994), Munhall (1994), and Smith (1996). Benner (1994) published a book entitled Interpretive Phenomenology: Embodiment, Caring, and Ethics in Health and Illness. The book serves as a guide for interpretive phenomenology in studying health, illness, and caring practices in the nursing discipline. In Revisioning Phenomenology: Nursing and Health Science Research, Munhall (1994) guided readers in developing phenomenological thinking to find meaning in human lived experiences. Adopting Heidegger’s hermeneutic approach, Munhall’s (1994) PA interprets the meaning of a phenomenon by exploring individuals’ lived experiences similar to van Manen’s (2016) four lifeworld existential concepts: spatiality, corporeality, temporality, and relationality. In a later publication, Munhall’s (2012) presented a pragmatic flexible structure of PA as a methodology by going beyond interpreting lived experiences using philosophical critique to solve problems in the nursing field. In addition, Munhall (1994) recognized the importance of historical context in PA since interpretations are passed down through language and culture. This assumption aligns with Heideggerian phenomenology as part of Dasein that situated human existence cannot be detached from culture and history (Heidegger, 1962/2019). Likewise, Benner’s (1994) PA outlined the importance of describing lived experiences by searching for cultural-based meanings among participants.

Smith’s (1996) PA is rooted in psychology, similar to Giorgi’s (2009) DPPM. Smith (1996) developed a PA adaptation known as Interpretative Phenomenological Analysis (IPA). The underlying difference between DPPM and IPA is the philosophical assumptions and principles that dictate their strategies, with the former being descriptive while the latter being interpretive in nature. Giorgi’s (2009) DPPM was rooted in Husserlian phenomenology, while Smith (2018) admitted that IPA aligns with Heideggerian phenomenology. DPPM focuses on understanding the relationships and differences of participants’ lived experiences to develop a descriptive understanding of a phenomenon. Meanwhile, IPA is concerned about microanalysis of experiences’ diversity and variability to develop an interpretive structure of a phenomenon (Smith & Eatough, 2008). IPA investigates and analyzes how individuals make sense of their experiences in life (Smith et al., 2009). However, IPA became controversial when van Manen (2017) critically appraised this approach. Van Manen (2017) questioned whether IPA is truly phenomenological in nature or a psychological analysis method. Smith (2018) debunked van Manen’s (2017) claim by presenting IPA’s historical context, researcher’s roles, central focus, underlying assumptions, and analytical approaches. Hence, IPA is considered phenomenological (Smith, 2018).

Following the work of Heidegger that uses an interpretive approach to understand hidden or taken-for-granted meanings, Hans-Georg Gadamer expanded phenomenology. Gadamer’s (1998) approach is very similar to constructivism, wherein the researchers’ assumptions are integrated with participants in creating meanings. In this approach, researchers’ preconceived notions of a phenomenon based on past experiences are crucial in understanding the present context under investigation (Debesay et al., 2008). Thus, Gadamer’s constructivist approach interprets a phenomenon through a fusion of horizons of the past and present occurrences (Debesay et al., 2008; Dowling, 2007; Gadamer, 1998; Laverty, 2003). Researchers’ presuppositions and continuous feedback from participants are necessary for the evolving process of analysis as part of the dialogical method (Debesay et al., 2008; Dowling, 2007; Koch, 1999; Laverty, 2003). Lastly, one of the popular adaptations is van Manen’s phenomenology that serves as a philosophy and as a methodological research approach. According to Dowling (2007), van Manen’s phenomenology was a combined tradition of descriptive and interpretive approaches. Van Manen’s human science approach is consistent with the first phenomenologists. Similar to Husserl’s descriptive phenomenology, some of van Manen’s (2016) PA concepts were lived experience, consciousness, essences, and thoughtfulness. In addition, van Manen’s (2016) PA also adopted Heideggerian interpretive phenomenology concepts such as hermeneutics and interpretation of experiential meanings. Van Manen’s (2016) PA also acknowledged intersubjectivity, an approach that aligns to the interpretive paradigm wherein researchers build a dialogic relationship with participants. This adaptation of van Manen’s (2016) phenomenological practice and research has been widespread in contemporary nursing research and other disciplines.
The above historical, ontological, and epistemological overview illustrated how GT and PA evolved and were established as research methodologies. Both methodologies have different adaptations with distinct philosophical assumptions that researchers should comprehend. Both methodologies are highly complex approaches and have similar or overlapping features (Baker et al., 1992). The researchers should neither combine both methodologies nor mix strategies distinct to the assumptions of a specific adaptation when their intent is not to conduct a qualitative mixed-method study. Padgett (2017) cited an example wherein a study employed phenomenology as a methodology but used a coding technique from grounded theory. When researchers chose one specific adaptation of methodology, they should follow congruently the philosophical assumptions and strategies in conducting research to avoid method slurring. Method slurring amalgamates philosophically different methodological approaches and strategies, considered sloppy in research (Baker et al., 1992). By understanding the various philosophical underpinnings of methodologies’ different adaptations, novice researchers can reflect on which specific paradigm and methodological assumptions resonate with their personal worldview.

Methodological Strategies

The distinctions of various adaptations are significant in that the philosophical assumptions guide the methodological strategies. Methods are techniques and strategies for sampling, collecting, and analyzing data. The philosophical underpinnings of a specific adaptation of methodology will influence these techniques and strategies (Richards & Morse, 2013). Hence, there will be similarities and differences in the methods of GT and PA’s adaptations.

Sampling and Data Collection

Both approaches are relatively similar in data generation and design of open-ended structured interview questions but have varying strategies in sampling. Purposive sampling is used in PA to recruit participants with rich and diverse experiences of a phenomenon under study (Creswell & Poth, 2018). Likewise, GT also uses purposive sampling in recruiting participants who have varying experiences of a phenomenon to explore multiple dimensions of social processes aimed toward theory construction (Morse & Field, 2013). However, theoretical sampling is additionally employed in GT to seek participants for specific information, which develops the properties of the theoretical categories until no new data emerge (Charmaz, 2014). Neither GT nor PA has prescribed an exact number of participants as sampling depends on the study’s goals. In GT, Creswell and Poth (2018) suggested that researchers may conduct 20–60 interviews in GT to collect data until saturation; although, predicting how many interviews are needed to saturate a given theory is challenging. Charmaz (2014) recommended that 25 interviews are sufficient, while Glaser (1992) suggested fewer participants may suffice. However, as a study progresses, researchers continue to add individuals to the sample until theoretical saturation is achieved, which is when data collection uncovers no new core categories (Charmaz, 2014). In comparison, participants in PA are a heterogeneous group that can vary in sample size from three to four or 10–15 individuals who have experienced a phenomenon under investigation (Morse, 1994). Even few participants are considered adequate, in some PA studies, to uncover a phenomenon’s core elements. Distinct to Benner’s (1994) PA is the recommendation of the presence of two researchers during interviews for inter reliability of data collection.

Data Analysis

As identified above, there are variations in the views of reality and knowledge development among adaptations of GT and PA that dictate how to proceed with data analysis. The analytical procedure among GT adaptations has another layer of methodological similarities and differences. The strategy at the center of all forms of GT involves constant comparative analysis. Constant comparative analysis is an inductive analytical process of concurrent data collection while contrasting data, concepts, categories, and theoretical claims to produce knowledge (Charmaz, 2014; Strauss & Corbin, 2015). Another crucial method among all GT adaptations is memo-writing, also known as memoing. Memoing is the strategy of writing analytic ideas that are part of the analysis in developing a theory by elaborating, specifying, and formulating the processes behind the concepts of core categories (Charmaz, 2014). Although the primary strategy of all GT adaptations involves constant comparative analysis and memoing, the procedure of creating a theory is diverse. In Strauss and Corbin (2015) GT, data analyses involve coding as categories develop (open coding), detailing additional categories (axial coding) that form a conceptual model, intersecting categories (selective coding) that predict relationships, and integrating by building a substantive-level theory (theoretical coding) that explains the processes and propositions of a phenomenon. The substantive theory created is made through multiple perspectives confirming the same data. The analytical approach in Glaserian GT is somewhat similar that includes substantive coding (which includes open coding and selective coding) and theoretical coding, but separating theory generation and verification to be objective as highly as possible (Rieger, 2019). In constructivist GT, data analysis includes initial coding (studying fragments of data and labeling them with codes), focus coding (emphasizing commonly reappearing initial codes) that form the abstract categories, and theoretical coding (Charmaz, 2014). Data analysis of Glaser and Strauss (1967) is also similar to other GTs; however, in the process, the theory is discovered rather than constructed. In comparison, constructivist GT acknowledges preconceptions that may influence data during focus coding. As a result, the substantive
theory is constructed from the interpretation rather than exact representation of data since theory formation is dependent on the researcher’s view and cannot transpire without it. Charmaz (2014) recommended that engaging in reflexivity may identify preconceptions and not impose a pre-existing frame on data. Reflexivity is the process whereby researchers record, self-reflect, and acknowledge assumptions that they bring into the process of conducting qualitative interpretive studies (Charmaz, 2014).

As with GT, the methodological strategies of PA depend on the specific adaptations. Giorgi’s (2012) DPPM, influenced by Husserl’s views, employs reduction to understand a phenomenon’s primordial state under investigation, a technique consistent with objectivism (Dowling 2007; Giorgi, 2009). Phenomenological reduction is employed by intentionally ignoring researchers’ preconceived notions to achieve an accurate description and essence of a phenomenon as it is lived and experienced by participants (Giorgi, 2012). In this strategy, researchers focus on participants’ lived experiences’ attributed meaning through thematic analysis and not influence findings with their own preconceptions. Descriptive PA also concentrates on participants’ lived experiences by describing them without further interpretation and entrusting the final interpretation to readers (Corben, 1999). However, not all PAs use phenomenological reduction or bracketing. Gadamer (1998) and Heidegger (1962/2019) argued that bracketing is impossible (Annels, 1996; Laverty, 2003). As mentioned above, Heideggerian PA aims to recognize the researchers’ humanness. Researchers’ a priori knowledge and expertise are integrated with the participants’ lived experiences to analyze and interpret data collected (Corben, 1999; Munhall, 2012). The interpretation of data will reveal the actual social context of a phenomenon (Bynum et al., 2018; Munhall, 2012). Instead of bracketing, Benner’s (1994) PA requirement is similar to Charmaz’s (2014) reflexivity, which is being critically reflective of own assumptions that may impact understanding of a phenomenon. By way of contrast, Munhall’s PA employs unknowing. Unknowing is a process of decentering researchers’ perspectives to understand the contextual experiences described by research participants (Bynum et al., 2008). Munhall (2012) recommended writing down any prior knowledge, preconceptions, and biases about a phenomenon, not to be blinded by them while interpreting the lived experiences under investigation as perceived by the research participants.

Prior to analysis, Munhall (2012) encouraged researchers to undergo immersion with phenomenology’s tenets, assumptions, and underpinnings. In their analysis, most phenomenologists search for meaning units that reflect the dimensional aspect of lived experiences and use meanings to represent interpretations (Creswell & Poth, 2018). The researcher needs to identify the descriptors of the essence and common meanings of the experience and highlight significant statements in the form of participants’ quotes. In Giorgi’s (2009) DPPM, the only difference is the requirement of being psychologically sensitive in transforming and determining the meanings of what is really being expressed by participants’ descriptions. Distinct to interpretive PA is the hermeneutic circle, which is the ongoing circular process of pre-understanding and complete interpretation by reading then rereading individual interview transcripts (the parts) to determine the evolving understanding of the hidden meaning (the whole) of being-in-the-world (Burns & Peacock, 2019; Bynum & Varpio, 2018; Debesay et al., 2008). Lastly, returning to participants to confirm the interpretation is essential in interpretive PA. Munhall (2012) recommends checking with the participants to verify if the researchers’ interpretation of the phenomenon reflects participants’ lived experiences.

Utility and Outcome in Health and Nursing Research

As reviewed above, both approaches have complex adaptations with different philosophical assumptions and diverse methodological terms and procedures. These adaptations have been considered useful research approaches. Various studies adhered to the guidelines of the specific adaptations and followed directions of primary authors that produced valuable outcomes and contributed to health and nursing knowledge.

Although other scholars may claim that using GT methods (e.g., constant comparative analysis) to bring about description without developing any form of theory is still considered a GT study, this paper argues that the ultimate purpose of GT is to produce a theory to explain a phenomenon (Birks et al., 2019; Bryant, 2017; Charmaz, 2014; Glaser & Strauss, 1967; Hadley, 2017; Strauss & Corbin, 2015). A theory is the product of this methodology that reflects GT’s name (Strauss & Corbin, 2015). However, there were disagreements on what is an accepted theory, which is rooted in the controversy of the semantics of a theory with varying levels and scopes (Charmaz, 2014). As an outcome of GT, a core categorical form with theoretical explanations (revealing connections of social processes) is acceptable from conceptual, substantive, middle-ranged, to high-level grand theory; however, merely themes or descriptive results are unsatisfactory (Charmaz, 2014; Glaser, 2002; Strauss & Corbin, 2015; Timonen et al., 2018).

The first version of GT provided methodological strategies and advocated for discovering theory-generated data (Glaser & Strauss, 1967). In Glaserian GT, substantive theories emerge from data unconnected from scientific observers’ points of view. As with Charmaz (2014), Strauss and Corbin (2008) acknowledged researchers conducting qualitative descriptive studies using GT methods and techniques producing descriptions without generating a theory. However, in a later edition, Strauss and Corbin (2015) firmly reiterated methodological consistency (adhering to assumptions and set of methodological strategies) that researchers should not refer to
their studies as GT without generating a substantive theory. Some research investigations adopted GT methods (e.g., constant comparison and memo-writing) for their qualitative research to analyze and interpret data to generate descriptions rather than a theory. According to Strauss and Corbin (2015), these research investigations must be claimed as descriptive studies that employed GT strategies and techniques. In contrast to Glaserian GT, Charmaz (2014) believed that theories are not discovered but rather constructed. Similar to Charmaz (2014), Strauss and Corbin’s (2015) constructivist GT recognized that researchers are part of the study, and their perspectives are involved in constructing grounded theories.

Glaserian GT was employed by Waxegård and Thulesius (2016) in their study. They conducted a research among healthcare professionals when integrating care pathways for patients with neurodevelopmental disorders. As an intended outcome of Glaserian GT, the theory of unpacking control emerged as a product of their study. This substantive theory assisted healthcare professionals in improving the development of care for neurodevelopmental disorders (Waxegård & Thulesius, 2016). The output contributed to healthcare professionals working on expanding patients’ life space, achieving healthcare goals, and boosting professional integrity. An example of Glaser and Strauss’s GT is the study by Sala-Defilippis et al. (2020). They employed post-positivist GT to conceptualize a theoretical model of harmonized connectedness in intensive care nursing. This model presented insights in experiencing moral practice, resilience, and well-being among nurses working in critical care. A study by Jackson et al. (2018) employed Strauss and Corbin’s (2015) GT to understand the resilience of nurses working in critical care to offset burnout and employment difficulties. The outcome of their study is a theoretical model minimizing hazards that advanced safety in intensive and critical care nursing. This model promotes flexibility and prevents burnout among nurses in critical care settings, which had positive implications for healthcare policy (Jackson et al., 2018). Another example is a study by Penz and Duggleby (2011) that provided a substantive theory on the processes of harmonizing hope that used Charmaz’s constructivist GT. The findings advanced the understanding of hope in palliative nursing practice in the community setting. The study also highlighted the processes of harmonizing hope such as “looking both ways,” “connecting with others,” “seeing the bigger picture,” and “trying to make a difference” (Penz & Duggleby, 2011). These findings are significant for palliative care nurses in the community to sustain hope in their practice of providing optimal care.

In health and nursing, the emphasis on PA is placed on a complex phenomenon exploring emotional states such as the concept of pain, trauma, hope, experience of grief, experiences of having a disease, or what it means to live with illness (Corben, 1999; Creswell & Poth, 2018). Compared to GT, PA adaptations have varying outcomes. Munhall (2012) described seven stages in conducting an inquiry that starts from immersion with phenomenology’s philosophical assumptions and ends with a narrative outcome. By way of contrast, the findings based on Benner’s (1994) PA can be portrayed as a paradigm case, a short exemplar describing meaningful lived experiences or written thematic analyses. On the other hand, Giorgi’s (2012) DPPM result in a general structure capturing the essential aspects of an experience. A descriptive PA study by Esbensen et al. (2008) employed Giorgi’s (1985) PA to describe the lived experience of being given a cancer diagnosis in old age. The findings revealed the structure of essence of having “illness as a turning point marking old age,” which provides implications for healthcare professionals in providing care for the elderly diagnosed with cancer (Esbensen et al., 2008, p. 397). In Munhall’s (2012) interpretive PA, the outcome is directed toward producing a narrative that reveals the deep meaning of individual lived experiences of a phenomenon, which informs nurses with a deeper understanding of patients’ situated context (Munhall, 2012). For example, a study by Peacock et al. (2014) provided a deep understanding of the meaning of family caregivers’ lived experience in providing end-of-life care to persons with dementia by analyzing their four existential lifeworlds. Congruent to Munhall’s (2012) PA, Peacock et al. (2014) returned to participants to confirm descriptions and interpretations of participants’ lived experiences that established the findings’ credibility. Consistent with Munhall’s (2012) PA outcomes, Peacock (2015) published a reflective narrative account of being-with and being-there in that specific phenomenon. This narrative outcome resonated profound insights into family caregivers’ lived experiences, which are valuable for health care professionals to understand and support them in similar contexts.

The study of Mauleon et al. (2007) on patients experiencing local anesthesia and hip surgery used the interpretive PA developed by Benner (1994). The study is congruent to Benner’s (1994) PA in examining similar social contexts to understand better-shared meanings in the illness lived experience. Following the aims of Benner’s (1994) PA, Mauleon et al. (2007) developed a paradigm case showcasing how procedural experience of local anesthesia and surgery compromise patients’ well-being and comfort. The result of the study revealed exemplars of patients’ lived experiences of severe pain and long waits negotiated by their trust and distrust (Mauleon et al., 2007). The identified challenges in patients’ lived experiences in anesthesia and hip surgery aid healthcare providers to intervene, support, and care based on patients’ perspectives. In the same way, with van Manen’s (2016) PA, the outcome provides a critical expressive elaboration of themes for the readers to visualize the moment and understand a more profound significance of a specific human lived experience. Using van Manen’s approach, the study of Meyer (2017) revealed the essence of living with a peripherally inserted central catheter (PICC) related to deep vein thrombosis (DVT). The study contributed to health-related knowledge about an in-depth understanding of the patients with PICC-related DVT. The findings revealed the following three themes: “a loss of trust in health care providers,
additional burdens to existing problems, and a yearning for understanding” (Meyer, 2017, p. 287). Meyer (2017) provided a table of exemplars of the three themes as part of the results. The examples in each theme were thoughtful interpretations rather than shallow rephrased texts of the lived experience of having PICC-related DVT. Meyer’s (2017) presentation of meaningful patients’ perspectives were consistent with van Manen’s approach.

Based on the cited studies, specific adaptations of both approaches are consistent with the qualitative research methodologies in uncovering experiences of a social phenomenon in natural settings. The approaches are also readily operationalized in addressing concerns related to health and nursing. In distinction, PA explores meanings that bring about a descriptive outcome to understand the essence of a phenomenon of common lived experiences. In contrast, GT extends beyond the description by examining the social processes to develop a substantive theory about a given context. Hence, both qualitative methodologies’ utility is similar to exploring human experiences, but both have different health and nursing knowledge outcomes.

**Strengths and Limitations**

With immersion in the literature on both methodologies’ specific adaptations, the strengths, challenges, and limitations can be distinguished. The approach of GT has a central focus on common social processes versus the PA’s focus on lived experiences of research participants. Thus, PA is one of the robust approaches for studying the meaning of lived experiences (Creswell & Poth, 2018). Meanwhile, GT generally generates a substantive theory that will explain social processes or actions, an outcome that supports the strength of GT as a methodology. Hence, GT is best suited in studying a phenomenon with little known information, not just to understand but also to advance description through uni

**Applicability and Choosing the Appropriate Methodology**

The suitability of a methodology to a proposed area of research is essential to determine whether it meets the objectives of a research inquiry. Choosing the best fitting methodology is strongly driven by the following considerations: research topic, literature review, research question(s), purposes of the study, intended outcome, and researcher’s reflection on personal philosophical assumptions (Creswell & Poth, 2018;
Morse & Field, 2013; Richards & Morse, 2013). Richard and Morse (2013) argued that the interconnection among these considerations leads to methodological congruence (coherence in research design’s key components). As an example, I illustrated below how I used the aforementioned considerations in navigating between the two methodologies to pin down a specific adaptation that would support my research proposal about the Accountable Care Unit (ACU).

**Research Topic and Literature Review**

A research topic can be drawn from work settings, clinical experiences, and personal interests. ACU was a department where I have worked as a nurse and sparked my curiosity due to the ACU’s interprofessional collaborative effort. Essential in doing research, conducting a literature review about ACU is crucial that has integral steps involved, which will not be covered in this paper. Researchers need to read further to be knowledgeable and skilled in the comprehensive process of critically appraising and summarizing evidence to achieve a rigorous literature review (Coughlan & Cronin, 2017). Understanding the context of ACU and navigating the literature will reveal what already exists and gaps in knowledge. As an illustration, I will draw upon my research interest focused on patients’ experiences receiving care in an ACU context. The ACU has recently been piloted and adopted in various hospital units in Saskatchewan. In terms of available literature, previous studies have relied primarily on quantitative evidence measuring multiple health outcomes in ACUs (El Helou et al., 2017; Hendricks et al., 2018; Howard et al., 2019; Jala et al., 2019; Kara et al., 2018; O’leary et al., 2015; RQHR, 2017; SHA, 2018; Stein et al., 2015). In addition, past studies have not explored patients’ experiences. Since ACU development, there is little known about the functional and social processes associated with the ACU specific to the subjective perspective of patients. There is also no overarching theoretical perspective that satisfactorily explains what is occurring in ACU from the patients’ perspectives. This context and available literature direct the research agenda about ACU.

**Research Question**

The best method is the one that addresses to answer the research question (Richard & Morse, 2013). The research question is formulated based on the context and literature review conducted, providing a new understanding of the subject matter. Framing the question with a clear focus will narrow down the path in choosing the methodological approach. With the existing gaps in the qualitative evidence, understanding patients’ experiences in ACU settings will be the research question’s focus. This focus points toward a qualitative design, but either GT or PA can explore and understand patients’ experiences. In terms of analyzing which best answers the research problem about ACU, the question needs to be framed. In GT, the research question would be, “what are the social processes that impact the patients’ care experience on ACU?” In comparison, the research question in PA would be focusing on the nature of how patients experience care in ACU. Another way to frame the question based on Munhall (2012) would be, “what is the meaning of the lived experience of patients receiving care on an ACU?”

**Purpose and Intended Outcome**

The research’s objectives and intended outcome can further narrow down the qualitative approach to a specific methodology. In the topic of ACU, the purpose of understanding the actions and social processes of accountable care within the social context of ACU directed the decision towards choosing a GT methodology. Symbolic interactionism, which is the foundational assumption of GT, can significantly explore and understand the social complexities of accountable care experienced by patients. GT is also deemed most suitable for exploring social actions that occur over time. In terms of illustrative outcomes between GT and PA, the former would lead to the development of substantive theory describing ACU’s social processes as experienced by the patients. Meanwhile, the latter would result in a narrative that contributes to a profound understanding of the care experiences in an ACU setting. However, there is no overarching theory to illustrate the social processes and related concepts to explain patients’ ACU experiences. As an intended outcome, a substantive theory development grounded from data can fill this gap. Indeed, PA can lead to a deeper understanding of various existential layers of a phenomenon based on the context of human experience, but GT can serve a purpose in moving beyond the description to develop a substantive theory. From within this purpose and intended outcome, a conclusive decision to choose GT is made over PA.

**Reflection of Researcher’s Philosophical Assumptions**

Determining the approach is driven by researchers’ questions, and the specific adaptation is dictated by philosophical assumptions. After selecting between GT and PA, personal philosophical underpinnings will influence which specific adaptation will be employed. Instead of claiming the methodology used in a study as generally GT or PA, researchers should pin down the specific adaptation of a methodology and convey the assumptions so that readers can determine the appropriateness and rigor in research design. Researchers conducting qualitative inquiry are expected to be knowledgeable about ontological and epistemological issues to navigate the method consistent with their own philosophical perspective.

As I am a nurse who considers the significance of subjectivity, I acknowledge relativism which is consistent with the interpretive paradigm that views reality as subjective,
shared, complex, contextual, and socially constructed. If I believe that reality should be objectively measured not to influence knowledge development, I will choose adaptations in the post-positivist paradigm. However, I consider my existing knowledge and assumptions of ACU may shape analyses, interpretation, and presentation of the research findings. Undoubtedly, the methodological overview of this paper’s first part is significant in understanding and reflecting on the specific adaptations of methodology. These reflections on my philosophical assumptions narrowed down the specific adaptation of methodology in the interpretive or constructivist paradigm.

Specifically, the constructivist GT is primarily selected to construct a substantive theory using my reflexive analysis and abductive reasoning (Charmaz, 2014). My personal beliefs align with constructivist assumptions, wherein my insider’s view is permitted to socially develop a rich construction of knowledge about ACU through engagement with participants (Charmaz, 2014). Additionally, constructivist GT presents clear methodological steps compared to Glaserian GT while offering fewer methodological rules than Strauss and Corbin’s GT. Thus, constructivist GT is the most suitable methodology based on my personal philosophical assumptions.

After narrowing and pinning down the specific methodology of choice, novice nurses must read the books cited in this paper that have in-depth descriptions of philosophical assumptions and methodological terms of that specific adaptation to provide supporting arguments for their research proposal. In terms of the exemplar in conducting a study on the experiences of patients in ACU, I argue that constructivist GT serves as the appropriate research approach because this methodology answers the research question, supports the research purpose, meets the intended outcome, and aligns with my views as a researcher. Hence, constructivist GT is the best fit for the proposed research about ACU. Finally, adhering to the specific adaptation’s philosophical assumptions and methodological strategies as designed throughout the research process (data collection, analysis, and interpretation of findings) will result in methodological congruence (Richard & Morse, 2012).

Conclusion

To the best of my knowledge, there is limited published literature that described and compared the philosophical assumptions of GT and PA’s different adaptations. In this paper, I attempted to clarify both approaches’ different adaptations from the level of philosophical underpinnings up to their utility. This overview will inform researchers on the best specific adaptation of methodology that fits their research. The origins, philosophical assumptions, methodological strategies, utility, outcomes, strengths, and limitations of both approaches provided general understanding of the overlaps, similarities, and differences in the possibilities of underpinning a research study. Although there are other adaptations of these two methodologies, this paper is limited to discussing adaptations that fall into post-positivism, interpretivism, and constructivism. Further comparisons of adaptations in postmodernism, feminism, and critical theory paradigms are needed. Additionally, this paper would not be able to cover the comprehensive details of each specific adaptation. Thus, further reading of books about the specific adaptation of methodology chosen by the readers for their study is warranted.

As an illustration, to choose a specific adaptation between GT and PA, I have drawn upon my research interest in understanding patients’ care experiences in ACU. Upon considering the ACU topic, literature, research questions, purposes, intended outcome, and personal philosophical assumptions, a specific adaptation of methodology emerges as a suitable qualitative research approach to conduct the study. Reflecting on the philosophical developments over time and identifying one’s philosophical assumptions will support selecting a specific adaptation of a methodology that fits to address a research problem. Through methodological immersion with the philosophical assumptions and strategies of GT and PA’s different adaptations, novice researchers would be able to identify the methodologies’ distinctive differences and attributes when implemented in a study. Overall, this paper may empower novice researchers to develop a general overview of the two qualitative methodologies and facilitate in selecting an appropriate adaptation of methodology for their research.

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ORCID iD

Ivan Aldrich Urcia 0000-0002-7134-6223

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