

Editors: Janice M. Morse, Barbara J. Bowers, Kathy Charmaz, Adele E. Clarke, Juliet Cobin and Caroline Jane Porr, with Phyllis Noerager Stern

Developing Grounded Theory

The Second Generation Revisited

SECOND EDITION



“Morse and the developers of the second generation grounded theory allow us a rare glimpse of the makings of qualitative methodology as it has evolved to meet the needs of an increasingly diversified scholarly audience.”

—**Sally Thorne**, Professor, University of British Columbia, Canada

“This book demonstrates how the field of Grounded Theory research and methodology has been developed by the second generation of researchers. This makes the book an invaluable resource for researchers and students at the same time.”

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“This revised edition underlines the contributions of this exceptional group, incorporating individual chapters on the various distinctive approaches. The result is a comprehensible and immensely valuable addition to the GTM literature.”

—**Antony Bryant**, Professor of Informatics, Leeds Beckett University, UK



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DEVELOPING GROUNDED THEORY

Developing Grounded Theory: The Second Generation Revisited is a highly accessible description of the rapid development of grounded theories and the latest developments in grounded theory methods.

A succinct overview of the development of grounded theory is provided, including the similarities and differences between Glaserian and Straussian grounded theory. The method introduced by Schatzman, and the development of Charmaz's constructivist grounded theory and Clarke's situational analysis, are clearly presented. The book is divided into seven sections: each type of grounded theory is discussed by the developer (or their student), followed by a chapter describing a project that used that particular type of grounded theory. Bookending these chapters is the first chapter, which describes the development and landscape of grounded theory, and a final chapter describing the challenges to the future of grounded theory.

This book is ideally suited for beginning students trying to come to grips with the field and more advanced researchers attempting to delineate the major types of grounded theory.

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DEVELOPING GROUNDED THEORY

The Second Generation Revisited

Second Edition

Editors:

Janice M. Morse

Barbara J. Bowers

Kathy Charmaz

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*To Anselm and Barney
with gratitude and respect
and to the generations to follow
and
For Kathy*



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PREFACE TO THE SECOND EDITION

There have been many developments in grounded theory research methods (yes, plural!) since the first edition of this text appeared in 2009. We have witnessed a flurry of changes, and much has changed, been reformulated, and been published since then. Grounded theory is now the most frequently used qualitative method transnationally, and in fact, most researchers typically cite the *type* of grounded theory they are using. That is, grounded theory itself has developed subspecialties—submethods, perspectives, and strategies—that within each submethod give the results a particular stance and nuances that increase the versatility and utility of the original grounded theory approach to qualitative analysis.

The Back Story to this Volume

On September 24, 2007, a one-day symposium was held, sponsored by the International Institute for Qualitative Methodology (IIQM), in conjunction with the Advances in Qualitative Methods Conference, in Banff, Alberta, Canada. For the first time, the major methodologists of the “second generation”—students of Barney Glaser and Anselm Strauss—gathered to discuss grounded theory, its developments, controversies, and emergent forms.

We called this symposium the “Grounded Theory Bash,” using *bash* in the celebratory sense. The workshop met all expectations: more than 200 people attended, and true dialogue centered on grounded theory began. The first edition of this book (Morse et al., 2009) arose as a record of the *proceedings*, supplemented with additional dialogue among the presenters.

Our initial intent was to publish the workshop papers as presented at the Grounded Theory Bash, as well as any dialogue and discussion from the floor. But

the book grew beyond that as, in the months following, discussions continued and new questions arose demanding answers. Some of these later discussions and new introductory and closing chapters were added to provide some context for the event. Some contributors also included research exemplars of the new types of grounded theory that have emerged.

The Second Edition

The 2007 edition was the first book that brought all of the grounded theory developments together as a *class of methods*. In this second edition, these methods have been further illuminated. The chapters about each of the types of grounded theory have been substantively revised. In addition, in this edition, each contributor has included an exemplary research article that reflects their “style” of grounded theory, making similarities and differences among the styles more apparent.

The “first generation” grounded theorists were Anselm Strauss and Barney Glaser. The “second generation” grounded theorists—all former students of Glaser and Strauss—still lead the development of grounded theory. The second generation includes Juliet Corbin, Phyllis Noerager Stern and Caroline Jane Porr, Barbara J. Bowers, Kathy Charmaz, and Adele E. Clarke. Each of the second generation authors writes a chapter here, describing their major approach to grounded theory.

Juliet Corbin, a student and colleague of the late Anselm Strauss for 15 years, writes Chapter 2, *Strauss’s Grounded Theory*. She describes the influence of Dewey on Strauss’s early years and outlines the main tenets of his method, using her own research as a working example. The exemplar to illustrate Straussian grounded theory is the contribution of Pennie Sessler Branden and concerns the development of the Sessler Branden Advocacy Theory (SBAT) and explicates the role of a nurse advocate (Chapter 3).

Glaserian Grounded Theory, Chapter 4, is co-authored by Phyllis Noerager Stern and Caroline Jane Porr. We sadly note the passing of Phyllis Noerager Stern in 2014. She was a student of Barney Glaser. Caroline Jane Porr co-authored a basic research text in Glaserian grounded theory with Phyllis (Stern & Porr, 2011) and is therefore uniquely qualified to revise and extend this chapter. The exemplar chapter for the Glaserian method, Chapter 5, was written by Judith Wuest and colleagues. Judith was a student of Phyllis Noerager Stern at Dalhousie University, and grounded theory is often still disseminated in this way from mentor to student. This chapter describes how grounded theory “works” to formulate a theory of domestic partner abuse and generate healthcare interventions for abused women.

In Chapter 6, Barbara J. Bowers and Leonard Schatzman (both students of Strauss) describe the background of dimensional analysis and its linkages to grounded theory and its unique contribution to knowledge. The exemplar chapter (Chapter 7), *Developing the Green House Nursing Care Team: Variations on*

Development and Implementation, coauthored by Barbara J. Bowers and Kimberly Nolet, was first published in the *Gerontologist*.

The “genesis, grounds and growth” of constructivist grounded theory are described by Kathy Charmaz in Chapter 8. She illustrates how constructivist grounded theory diverges from Glaserian grounded theory and how the method has evolved and matured over the past decades. In her explanation of the approach, Kathy Charmaz also provides many examples of its use. Terrie Vann-Ward then provides an exemplar of constructivist grounded theory (Chapter 9), exploring the ramifications of living with Parkinson’s disease.

Adele E. Clarke extended grounded theory as situational analysis, detailing its latest developments in Chapter 10, *From Grounded Theory to Situational Analysis: What’s New? Why? How?* Her chapter is extensive and detailed. Her former student, Jennifer Ruth Fosket, illustrates the usefulness of Clarke’s methodological innovation for empirically studying situated knowledges by presenting her own experiences of studying a large-scale, multi-sited clinical trial.

The final chapter, Chapter 12, offers an extended discussion of the processes and problems that have arisen due to myths associated with the various grounded theory methods and how to strengthen each of them. Sage advice from each author will put both new and more experienced grounded theorists in good stead into the future.

Additional readings in both grounded theory methods and substantive examples may be found following the biographies of the authors in the next section of this book.

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- Vann-Ward, T., Morse, J., & Charmaz, K. (2017). Preserving self: Theorizing the social and psychological processes of living with Parkinson Disease. *Qualitative Health Research*, 27(7), 964–982. Copyright © 2017 (Sage publications). <https://doi.org/10.1177/1049732317707494>. Reprinted with permission.

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SECTION I

Introduction



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1

THE MATURATION OF GROUNDED THEORY

*Janice M. Morse, Barbara J. Bowers, Adele E. Clarke,
Kathy Charmaz, Juliet Corbin, and Caroline Jane Porr*

Grounded theory consists of a systematic approach to inquiry for the purpose of theory construction (Charmaz, 2012) and is now the most frequently used qualitative research method in the social sciences transnationally. It is an excellent tool for accessing and developing knowledge most useful to the social sciences: it provides description (as detailed as the research question demands); it enables interpretation (to demonstrate how meaning is implied and how meanings are attributed to phenomena); it allows for individual and group experiences to be explicated and analyzed; and it facilitates developing the analysis conceptually and theoretically. The syntheses and theoretical framing of individual and group experiences permit these models to be applied externally—that is, to be generalized and applied to other similar settings and situations. They may also be linked to and expand other theories. In this way, grounded theory both builds and extends knowledge.

In the process of conceptual development, grounded theory considers both the static and the stagnant but can also encompass rapid changes that may occur within a person, group or situation. It considers the concrete and the objective, and importantly, it also includes the subjective and the inferential, throughout data interpretation and abstraction. Moreover, while creating theory that fits these data, it also enables explanation and incorporation of those data (negative cases) that do not fit.

From this broad description, we highlight here the three most important features that are unique to grounded theory. Grounded theory allows for:

- Description, understanding, and analysis of both action and change
- Generalization through theoretical development and abstraction
- Broad application that is also *applied, useful and widely used*.

These three characteristics make grounded theory distinctly powerful.

The documentation and understanding of patterns of action and change lift grounded theory research beyond the immediate context; abstraction, theorizing, and generalizing permit application to other contexts, situations, and groups. Schwalbe and colleagues (2000) call such patterns “generic social processes,” not unique but repeating across a range of situations. Thus results are not bound to isolated individuals or groups but are applicable to others who are experiencing similar events or problems.

Using grounded theory involves documenting and acknowledging the contexts and situatedness of research participants’ lives and the research situation. Further, the specific conditions under which the analysis holds must be explicated. Thus, other researchers can test and refine a published grounded theory (see, for example, the elaboration of the concept of “awareness contexts” in Glaser & Strauss, 1965, 1967; Mamo, 1999).

As no social science theory exists in isolation, a grounded theory may also be linked to the concepts and theories as described by others. This feature may verify its validity and application and vice versa. In these ways, a single grounded theory project may be powerful, impactful, and even change the direction of inquiry far beyond the usual disciplinary and contextual boundaries.

The Strategies of Grounded Theory

Grounded theory is a research method that enables the description and identification of the significant social processes and generates concepts used to document and explain the changes, or “what is going on” in a setting. It is the “discovery of theory from data—systematically obtained and analyzed in social research” (Glaser & Strauss, 1967, p. 1). More recent elaborations of grounded theory (Strauss, 1987, pp. 33–34, 1993, pp. 27–29; Charmaz, 1995, 2000, 2006, 2014a; Clarke, 2005; Clarke, Friese, & Washburn, 2015, 2018) argue that theory is “constructed” rather than “discovered.”

To achieve theory construction, grounded theory consists in pursuing distinct strategies that characterize the method and permit the researcher to focus on certain processes, verify those processes, identify negative cases, develop and link pertinent concepts, describe the conditions involved in the transitions between concepts, and ultimately develop a substantive theory linked both to the setting and to others’ extant research.

Initially the research process is primarily inductive, with distinctive strategies used to facilitate the researcher’s locating, identifying, and sorting relevant data, exploring and asking questions of those data in context, and comparing and contrasting important features as they are identified, in accordance with the purpose of the study. As the researcher’s understanding develops, abductive reasoning is then used to generate and confirm emerging concepts; the research question may subsequently be “corrected” modified or changed to focus more precisely on areas of interest as these are refined.

Abductive reasoning involves (1) analyzing an interesting or puzzling finding; (2) considering all possible theoretical explanations of this finding; (3) choosing the strongest theoretical explanation for it, which may be a new or extant theory; and (4) testing this tentative explanation through analyzing new data.

Codes and categories should then be developed into concepts, which are described, bounded and labeled. They may also be linked with concepts in the extant literature. A core category (Strauss, 1987, pp. 34–36; Glaser, 1978, pp. 98–100) or a basic social process (BSP) (Glaser, 1978, pp. 10–101) may be identified that may primarily hold phases of the process together. Mature grounded theory research results are explanatory, generalizable, and applicable to multiple settings and situations. While Glaserian grounded theorists seek generalizations that are abstracted from persons, time, and place, in contrast, recent versions of grounded theory argue against erasing differences, and situatedness, instead of urging their specification and elaboration.

It is not the intention of this book to serve as a manual for *doing* grounded theory. Even reading this book in its entirety would provide only scant information on how to become a strong grounded theorist. Rather, grounded theory method is first and foremost *a way of thinking* about and acting toward a research question or problem (e.g., Star, 2007). The cognitive effort involves (1) seeing, hearing, and making sense of your research problem; (2) deciding where to conduct the study; (3) identifying the initial participants and/or sources of data; (4) selecting the type of data to use; and (5) determining how to approach your data. Such efforts are often overwhelming, yet are only the first steps.

Although most data consist of interviews, grounded theorists also use other empirical sources such as documents, written policies, Internet materials, and visual materials. The researcher must decide how to analyze and integrate all the materials selected for the research project.

Remember that grounded theory is especially interested in processes and change; start there, continually looking and listening, transcribing, coding, and memoing to see “what is going on” in your data. But “what is going on” is not usually obvious, superficial, or self-evident. It may well be hidden, intuitive, and interpretative. But once you develop and conceptualize your findings and report them to others, people will light up and say “Oh, yes! That’s just how it is!” Thus, analysis involves working consciously and deliberately, thinking about and figuring out what your data are telling you by using grounded theory strategies.

What are these significant strategies that make a grounded *theory* into a *grounded* theory? The major distinctive strategies of grounded theory are the following:

Coding data: word by word, line by line, clump by clump, with codes that *conceptually* capture what is happening in the data—what the action is and where it is happening.

Memoing: the generation and recording of the codes and researcher's ideas about them; writing about the research project and processes, done concurrently with research design; and the gathering, coding, and analysis of data.

Theoretical sampling: seeking further data according to the *analytic needs* of the study, rather than the use of random selection or recruitment according to the researcher's convenience. Pursuing theoretical sampling also involves abductive reasoning.

Constant comparison: comparing data pieces with other relevant data pieces, comparing new data with already constructed categories, comparing categories with other categories and new categories with those in the extant research and theoretical literatures.

Exploration of negative cases: the analysis of instances or participants that do not fit the emerging pattern or theory currently "covering" or encompassing the bulk of the data. Determining *why* and *how* they do not fit adds analytic depth and insight.

Saturation: the continuing collection and analysis of data (with continued use of theoretical sampling) until no new characteristics of the constructed analytic categories emerge and a good range of differing examples of concepts and phenomena is fully evident.

Development of codes into categories, stages and, ultimately, into an integrated theoretical explanation linking these categories and phases, is the goal. The verification of categories and the development and linking of concepts through theorizing are requisite for the development of a fully developed *grounded theory*.

How do you know when you have finished a grounded theory research project? The completed grounded theory must be coherent and must have "theoretical purpose and relevance" (Glaser & Strauss, 1967, p 48). Glaser and Strauss (1967, p. 238; also Glaser, 1978) suggest that the completed theory must "fit," so that it is not "divorced from substantive areas so that one does not know how to apply them." The theory generated must be relevant to the problem, must *work* when made modifiable, and must be applied to adapt to changes.

The Emergence of Grounded Theory Methods

Grounded theory methods have been greatly elaborated over the last 60 years. They are best described by their shared objective of constructing fresh conceptual analyses that offer abstract understandings of the empirical problem or phenomenon under study.

The Origins of Grounded Theory

The originality of the contribution of Barney Glaser and Anselm Strauss (1967) in their development of grounded theory cannot be overestimated (Charmaz,

2008, 2014b, p. 1080). The *Discovery* book was the first manifesto for qualitative inquiry in a series that has led to the renaissance of qualitative inquiry we see today. In 1960, Strauss was recruited by University of California, San Francisco (UCSF) Dean of Nursing Helen Nahm to train nursing faculty and students in research methods, offer courses on social aspects of health and illness, and help organize doctoral programs. Strauss was soon joined by other sociologists, including Virginia Olesen, Fred Davis, Barney Glaser, Leonard Schatzman, and Egon Bittner. They obtained several NIH grants to examine the socialization of nursing students and created a research unit at the School of Nursing, UCSF. The Doctoral Program in Sociology was established in 1968, including students from both nursing and sociology (Schwartz, 2009). The unit, organized as the Department of Social and Behavioral Sciences in 1972, was distinguished by intense faculty mentorship of students, Strauss's leadership of team research (including co-authorship), and intense productivity. From this small program, an exceptionally innovative approach to qualitative inquiry was developed into a method that became highly applicable across social science disciplines and across professional training and is now used globally.

The Landscape of Grounded Theory Methods

The varied range of grounded theory literature that has emerged since the *Discovery* book in 1967 can be described as the *landscape of grounded theory methods*. We have divided it into four segments: (1) books authored by the originators of grounded theory, their collaborators, and their students—both research monographs and methods texts; (2) methods texts authored by other researchers explicating grounded theory methods; (3) articles and handbooks addressing special topics within grounded theory methods; and (4) articles and chapters that summarize, clarify, and simplify grounded theory methods (see Figure 1.1).

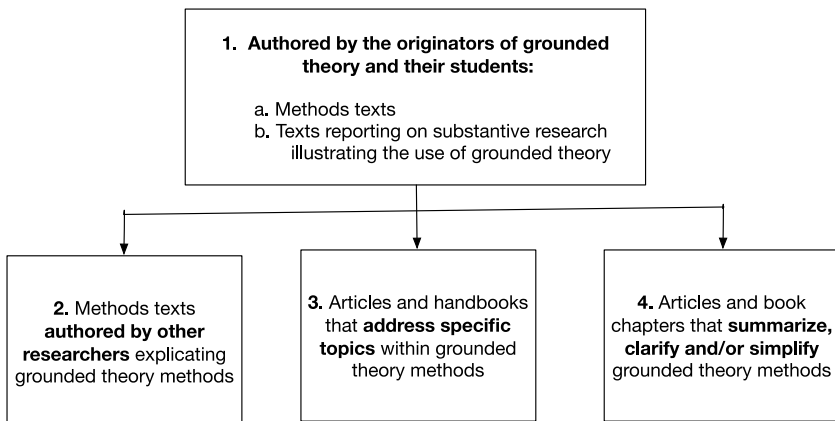


FIGURE 1.1 The Landscape of Grounded Theory Methods

Texts Authored by the Originators of Grounded Theory
 and Their Students

Initially Barney Glaser and Anselm Strauss, along with a doctoral nursing student, Jeanne Quint (later Benoliel), commenced a research study of dying in hospitals. This resulted in several research monographs: *Awareness of Dying* (Glaser & Strauss, 1965), *A Time for Dying* (Glaser & Strauss, 1968), and *The Nurse and the Dying Patient* (Quint, 1967) (see Table 1.1).

The first grounded theory methods book emerged from this collaboration: Glaser and Strauss’s (1967) *The Discovery of Grounded Theory: Strategies for*

TABLE 1.1 A List of Grounded Theory Methods Texts (Column A) and Substantive Research Monographs (Column B) Published by the Different Glaser and Strauss Research Groups, 1964–Present^a

A. Original Methods Texts			B. Research Monographs		
Date	Author(s)	Title	Date	Author(s)	Title
1967	Glaser & Strauss	<i>The Discovery of Grounded Theory: Strategies for Qualitative Research</i>	1964	Strauss, Schatzman, Bucher, Ehrlich & Sabshin	<i>Psychiatric Ideologies and Institutions</i>
1973	Schatzman & Strauss	<i>Field Research: Strategies for a Natural Sociology</i>	1965	Glaser & Strauss	<i>Awareness of Dying</i>
1978	Glaser	<i>Theoretical Sensitivity: Advances in the Methodology of Grounded Theory</i>	1967	Quint	<i>The Nurse and the Dying Patient</i>
1986	Chenitz & Swanson	<i>From Practice to Grounded Theory: Qualitative Research in Nursing</i>	1970	Glaser & Strauss	<i>Anguish: A Case History of a Dying Trajectory</i>
1987	Strauss	<i>Qualitative Analysis for Social Scientists</i>	1971	Glaser & Strauss	<i>Status Passage</i>
1990	Strauss & Corbin	<i>Basics of Qualitative Research: Grounded Theory Procedures and Techniques</i>	1971	Glaser	<i>Experts Versus Laymen: A Study of the Patsy and the Subcontractor</i>
1990	Corbin & Strauss	<i>Grounded theory research: Procedures, canons, and evaluative criteria.</i>	1975	Strauss & Glaser	<i>Chronic illness and the quality of life</i>

<i>A. Original Methods Texts</i>			<i>B. Research Monographs</i>		
<i>Date</i>	<i>Author(s)</i>	<i>Title</i>	<i>Date</i>	<i>Author(s)</i>	<i>Title</i>
1992	Glaser	<i>Basics of Grounded Theory Analysis: Emergence vs. Forcing</i>	1977	Fagerhaugh & Strauss	<i>Politics of Pain Management: Staff–Patient Interaction</i>
1994	Strauss & Corbin	<i>Grounded theory methodology: An overview</i>			
1998	Strauss & Corbin	<i>Basics of Qualitative Research: Grounded Theory Procedures and Techniques</i> (2nd ed.)	1980	Glaser & Strauss	<i>Time for Dying</i>
2001	Glaser	<i>The grounded theory perspective: Conceptualization contrasted with description</i>	1983	Fagerhaugh & Strauss	<i>Politics of Pain Management: Staff-Patient Interaction</i>
2003	Glaser	<i>The grounded theory perspective II: Description's remodeling of grounded theory methodology.</i>	1984	Strauss et al. (1984)	<i>Chronic illness and the quality of life</i>
2005	Glaser	<i>The grounded theory perspective III: Theoretical coding</i>	1987	Fagerhaugh	<i>Hazards in Hospital Care: Ensuring Patient Safety</i>
2005	Clarke	<i>Situational Analysis: Grounded Theory After the Postmodern Turn</i>	1989	Star	<i>Regions of the Mind: Brain Research and the Quest for Scientific Certainty</i>
2006	Charmaz	<i>Constructing Grounded Theory: A Practical Guide Through Qualitative Analysis</i>	1991	Maines (Ed.)	<i>Social Organization and Social Process: Essays in Honor of Anselm Strauss</i>
2007	Glaser	<i>Doing Formal Grounded Theory: A Proposal</i>	1991	Charmaz	<i>Good Days, Bad Days: The Self in Chronic Illness and Time</i>

(Continued)

TABLE 1.1 (Continued)

A. Original Methods Texts			B. Research Monographs		
Date	Author(s)	Title	Date	Author(s)	Title
2007	Bryant & Charmaz (Eds.)	<i>Handbook of Grounded Theory</i>	1993	Glaser (Ed.)	<i>Examples of Grounded Theory: A Reader</i>
2008	Corbin & Strauss	<i>Basics of Qualitative Research</i> (3rd ed.)	1993	Strauss	<i>Continual Permutations of Action</i>
2009	Morse et al.	<i>Developing Grounded Theory: The Second Generation</i>	1994	Glaser (Ed.)	<i>More Grounded Theory Methodology: A Reader</i>
2011	Stern & Porr	<i>Essentials of accessible grounded theory.</i>	1995a, 1995b	Glaser (ed.)	<i>Grounded Theory 1984–1994. Vols. 1 and 2</i>
2014a	Charmaz	<i>Constructing Grounded Theory</i> (2nd ed.)	1997	Strauss & Corbin (Eds.)	<i>Grounded Theory in Practice</i>
2014	Glaser	<i>Applying Grounded Theory: A Neglected Option</i>	1998	Clarke	<i>Disciplining Reproduction: The American Life Sciences and “the Production of Sex”</i>
2015	Corbin & Strauss	<i>Basics of Qualitative Research</i> (4th ed.)	2014	Clarke & Charmaz (Eds.)	<i>Grounded Theory and Situational Analysis</i> (4 vols.)
2015	Clarke et al. (Eds.)	<i>Situational Analysis in Practice: Mapping With Grounded Theory</i>	2015	Clarke et al. (Eds.)	<i>Situational Analysis in Practice: Mapping Research With Grounded Theory</i>
2015	Glaser (Ed.)	<i>Choosing Grounded Theory: A GT Reader of Expert Advice</i>			

A. Original Methods Texts			B. Research Monographs		
Date	Author(s)	Title	Date	Author(s)	Title
2016	Glaser	<i>Grounded Theory Perspective: Its Origin and Growth</i>			
2018	Clarke et al.	<i>Situational Analysis: Grounded Theory After the Interpretive Turn</i>			
2019	Bryant & Charmaz (Eds.)	<i>The Sage Handbook of Current Developments in Grounded Theory (2nd ed.)</i>			

Note: Anselm Strauss died in 1996.

Qualitative Research. This text became one of the most influential and highly cited books in qualitative research and remains in print today. The book directly challenged the then dominant “theory-methods package” (Star, 1989) of positivism and quantitative survey research in the U.S. Interestingly, the *Discovery* book was Glaser and Strauss’s final methods publication together.

In tandem with their substantive research, Glaser and Strauss, and also Leonard Schatzman, continued their interests in methodological development. In the collaborative and interactive research unit at UCSF, “the discovery of grounded theory” was applied as various research programs addressed different topics. Substantive research publications that used grounded theory began to emerge.

New methods texts were also written from within the research unit at UCSF, revising, expanding, and modifying the 1967 *Discovery* text. Schatzman and Strauss offered *Field Research: Strategies for a Natural Sociology* in 1973; Glaser published *Theoretical Sensitivity* in 1978; and Strauss published *Qualitative Analysis for Social Scientists* in 1987. Both through these methods texts and through an array of research publications, the sociology program Strauss established at UCSF has an unprecedented influence on social science communities. Colleague Virginia Olesen later commented, “I like to refer to this program as ‘The mouse that roared.’ This has always been a tiny program—never more than six or seven faculty. But my gosh, the contributions” (Virginia Olesen, cited in Schwartz, 2009).

Using symbolic interactionist theory and grounded theory method, research that emanated from this center provided the foundations of social scientific studies

of health and illness. Over the years, at UCSF, these areas developed from the early studies of dying to examining nursing work to studies of hospitals, patient work, studies of women and health, aging and health, chronic illness, and health policy. Emphasis was on publication: doctoral students were encouraged to publish their dissertations as books or journal articles. Strauss, in particular, formed research teams that included his students and former students as co-authors. (See, for example, the ground-breaking book by Strauss, Fagerhaugh, Suczek, & Wiener [1984/1997], *The Social Organization of Medical Work*.) These iterations of methods and substantive texts are detailed in Table 1.1.

The methods-focused collaboration between Barney Glaser and Anselm Strauss ended after the *Discovery* text. Two modes of doing grounded theory research gradually emerged, referred to as “Glaserian grounded theory” and “Straussian grounded theory” (Stern, 1994), something that was not surprising. Glaser and Strauss had both acquired sociology degrees but from very different academic institutions representing diverse approaches to social science research. It was the synergy of the two minds focused on understanding the dying process in California hospitals that resulted in the grounded theory method. As Glaser learned, under Straus’ mentorship, how written text, documents, and memoirs could serve as data and the basis for theory generation (as opposed to relying on abstract theoretical systems), Strauss learned from Glaser the line-by-line comparison technique that enabled Strauss to refine the process necessary for data abstraction and emergence of concepts. However, over time Strauss, steeped in academia, contributed to the evolution of grounded theory about which Glaser, who had left academia, perceived as a departure from, and an erosion of, the original method. The basic differences between Glaser and Strauss were described by Stern (1994), herself a Glaserian researcher:

Glaser and Strauss are two brilliant men and both do important work, but they go about it in different ways. The crux of the dichotomy is, I think, that Strauss, as he examines the data, stops at each word to ask, “What if?” Glaser keeps his attention focused on the data and asks, “What do we have here?” . . . Glaser focuses his attention *on* the data to allow the data to tell their own story.

(pp. 220–221)

Glaser left UCSF in the late 1970s, setting up the Grounded Theory Institute in nearby Marin. He has continued to offer grounded theory workshops and present internationally. Strauss remained on the UCSF faculty until retiring in 1987, then serving as professor emeritus until his death in 1996. In 1989, his former student Adele E. Clarke was hired into the UCSF Doctoral Program in Sociology in the School of Nursing.

Both Glaser and Strauss continued their mentorship of students and collaborations with their former students. Significantly, their differing perspectives

on grounded theory were then also incorporated into their students' methodological approaches as they learned and used grounded theory. As these former students became researchers in their own right, they adopted, developed, and adapted some (or all) of the perspectives and strategies of Glaser, Strauss, and/or Schatzman. For example, an important early nursing research text was written by students from Glaser and Strauss's seminars. Edited by Chenitz and Swanson (1986), it contained specific details about coding, memoing, developing categories, and abstracting data that these former students of the "first generation" grounded theorists perceived were poorly described in other texts.

Over time, further changes in grounded theory have occurred. Several students of Glaser and/or Strauss have emerged as leading methodologists in grounded theory, with their own expertise, interests, cadres of students, and colleagues. These researchers were referred to as the "Second Generation of Grounded Theorists" in the first edition of this book (Morse et al., 2009). They are developing new and innovative grounded theory methods and expanding the repertoire of grounded theory.

Thus, in this text, we follow the development of Juliet Corbin's continued collaboration with Anselm Strauss, clarifying Straussian grounded theory (1990–2015); Barbara J. Bowers' collaboration with Leonard Schatzman's dimensional analysis (1987–2009); Kathy Charmaz's further integration of pragmatism and constructivism with grounded theory (2000–present); and Adele E. Clarke's development of situational analysis (2003–present), more recently in collaboration with Carrie Friese and Rachel Washburn (2007–present). Glaser has continued to publish texts explicating grounded theory, while at the same time, Phyllis Noerager Stern (later in collaboration with Caroline Jane Porr) further developed Glaserian grounded theory (1994–2011).

Figure 1.2 offers a broad overview of these initial developments in grounded theory and provides an interesting landscape of works that Glaser and Strauss provoked.

Later Literature Contributing to Glaser's and/or Strauss's Grounded Theory Traditions

Of importance, over the years other grounded theory texts emerged that were not written by authors who were a part of the original UCSF Center. These authors included attendees at the numerous workshops, others who had carefully studied available articles and texts, and researchers who had conducted grounded theory studies. The first of these texts was written in Great Britain (Dey, 1999), and this has been followed internationally by many others internationally. As grounded theory became increasingly utilized in other disciplines, books were written specifically for those disciplines, using appropriate research examples (see Table 1.2).

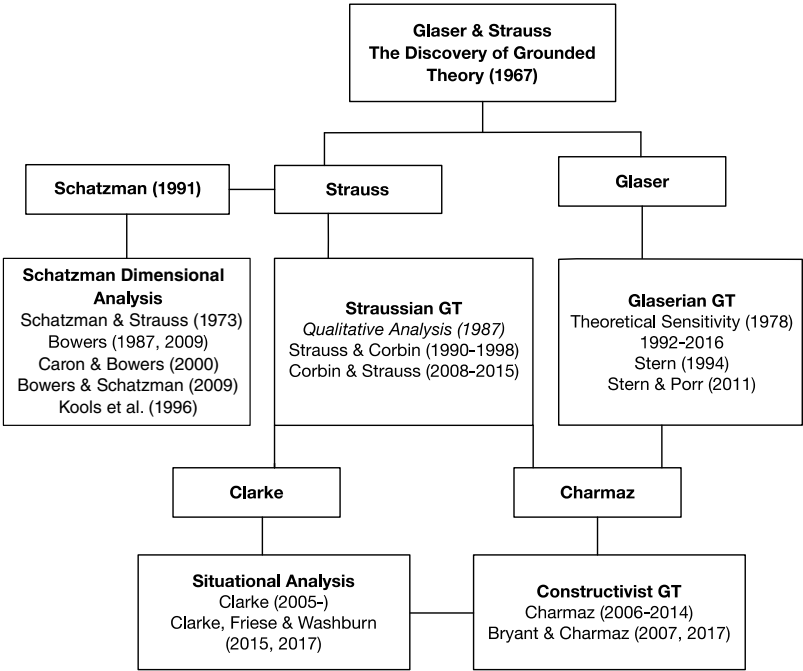


FIGURE 1.2 The Maturation of Grounded Theory Methods

TABLE 1.2 Examples of Texts Explicating Grounded Theory as a Method by Authors Who Were Not Members of the Initial Grounded Theory Research Collaboration at UCSF, General and Discipline Specific

General Grounded Theory Texts			Discipline-Specific Grounded Theory Texts		
Year	Authors	Title	Year	Authors	Title
1999	Dey	<i>Grounding Grounded Theory: Guidelines for Qualitative Inquiry</i>	2001	Locke	<i>Grounded Theory in Management Research</i>
2011	Birks & Mills	<i>Grounded Theory: A Practical Guide</i>	2001	Schreiber & Stern	<i>Using Grounded Theory in Nursing</i>
2011	Martin & Gynnild	<i>Grounded Theory: The Philosophy, Method, and Work of Barney Glaser</i>	2002	Goulding	<i>Grounded Theory: A Practical Guide for Management, Business and Market Researchers</i>

<i>General Grounded Theory Texts</i>			<i>Discipline-Specific Grounded Theory Texts</i>		
<i>Year</i>	<i>Authors</i>	<i>Title</i>	<i>Year</i>	<i>Authors</i>	<i>Title</i>
2013	Urquhart	<i>Grounded Theory for Qualitative Research: A Practical Guide</i>	2009	Artinian, Giske & Cone	<i>Glaserian Grounded Theory in Nursing Research: Trusting Emergence</i>
2014	Gibson & Hartman	<i>Rediscovering Grounded Theory</i>	2012	Oktay	<i>Grounded Theory (Pocket Guide to Social Work Series)</i>
2015	Birks & Mills	<i>Grounded Theory: A Practical Guide</i> (2nd ed.)	2015	O'Connor	<i>Social Work Constructivist Research</i>
2016	Hanzel	<i>The Grounded Type of Sociological Theory</i>	2016	Padgett	<i>Qualitative Methods in Social Work Research</i>
2017	Bryant	<i>Grounded Theory and Grounded Theorizing: Pragmatism in Research Practice</i>			
2017	Holton & Walsh	<i>Classic Grounded Theory: Applications With Qualitative and Quantitative Data</i>			
2018	Flick	<i>Doing grounded theory.</i>			
2019	Bryant	<i>Varieties of Grounded Theory</i>			

With these elaborations of grounded theory, changes inevitably occurred. In 1996, a special issue of *Qualitative Health Research* (Vol. 3, No. 3) featured Kathryn May as guest editor. In reviewing grounded theory's contributions to nursing knowledge, Benoliel (1996) noted that observational methods, initially integral to grounded theory, were now seldom used in nursing. Moreover, grounded theory data were originally primarily obtained from open-ended interviews and were now often derived from guided or semi-structured interviews.

Short Articles and Handbook Chapters Addressing Specific Topics Within Grounded Theory

The third type of literature we consider here consists of articles and book chapters that review, explain, interpret, and apply established grounded theory strategies. By *strategies*, we mean particular actions (or components of the method) that researchers use to facilitate the conduct of grounded theory research. These articles may address such topics as theoretical sampling, coding and memoing, constant comparison, and so forth.

This literature began to emerge from the originators themselves with the introduction of qualitative research handbooks. In 1994, Denzin and Lincoln's pioneering *Handbook of Qualitative Research* contained a chapter titled "Grounded Theory Methodology: An Overview" written by Strauss and Corbin (pp. 273–285). Since then, many articles have been written, addressing such topics as theoretical sampling, interviewing, coding, memoing, and so forth. Two ambitious *Grounded Theory Handbooks* appeared (in 2007 and 2019), both edited by Antony Bryant and Kathy Charmaz. They provide rich arrays of articles on special topics in grounded theory methods, but their intent is not to teach grounded theory. Therefore, these articles and handbooks do not replace the text-length books written by the originators of grounded theory or other authors. Instead they offer excellent supplementary materials that endorse or explain various aspects and strategies of grounded theory research. In short, they are intended to supplement methodological texts, not to replace them.

Articles and Book Chapters That Summarize, Clarify, and Simplify Grounded Theory Methods

The last grouping of the grounded theory literature includes articles and chapters that summarize and seek to clarify and/or simplify grounded theory methods for researchers who have little or no knowledge of *how to do* grounded theory research. These authors do intend to provide basic information about how to do grounded theory work. Unfortunately, too often these are the only resources used by some researchers who want to dodge reading entire original texts. Sadly, this information is typically applied in a stepwise fashion, leading to results that are simplistic and obvious, offering very poor and inadequate examples of grounded theory research.

Other sources for abbreviated grounded theory methods include the use of methods section of research articles that used grounded theory. These have also been used by subsequent researchers. Alternatively, the researcher may rely on a single chapter of a grounded theory text and provide a drastically limited understanding of the method in the methods section.

The major problem here is that such abbreviated sources and descriptions of methods do not effectively communicate the nuances of grounded theory

methods, much less demonstrate the researcher's competence in its use. Research emanating from the briefest instructions is inevitably lacking in description, depth, and theoretical development. Study samples are frequently inadequate, and the research typically offers little beyond an isolated and rather obvious description of everyday events, a few themes, or a typology. Integrated conceptual grounded theorizing is generally wholly absent.

Perhaps the first example of this literature was a detailed book review of Glaser and Strauss's *Discovery of Grounded Theory*, published by Strutzell (1968) in a nursing journal, *Nursing Research*. The author's intention in the review was to bring the interesting and innovative new strategies of the grounded theory method to the attention of nurse researchers. But sadly, the article was used as a resource per se for the conduct of grounded theory research. Moreover, the article is cited in Google Scholar as though it was a direct resource for conducting the research, with Glaser and Strauss actually listed as co-authors of the article along with Strutzell!

Because the interpretation of data is a key research process in grounded theory work, inadequacy in this skill is not superficially evident without deep knowledge of both the methodological expertise and the receptivity of insight into the process of inquiry. Both qualitative craft *and* theoretical thinking must be present. These require time, thoughtful inquiry, a deep understanding of the data, and the patience to carefully conceptualize and theorize those data to produce and document an integrated conceptual grounded theory. As with most if not all research methods today (e.g., Lynch, 2012), there are many problematic examples of grounded theory research in print. (We discuss some of the related issues in the concluding chapter of this volume.)

The Global Dissemination of Grounded Theory Methods

Today, grounded theory articles and books also appear in foreign journals and in many other languages across the social science and professions disciplines, indicating its global spread and international influence. It is widely accepted as a strong qualitative method, and again, it is the most commonly used qualitative method. Translations of texts by the originators of grounded theory are widely available and are listed at the end of this book.

The Internet has also greatly assisted international dissemination. Both Glaser and Charmaz have several video presentations from the UK available on YouTube,¹ and Clarke offers one from Germany (with her presentation in English).² We urge you to read, and be guided by, the texts and articles written by the originators of grounded theory and their "second generation" students.

Significantly, the chapters in this book do not replicate the original grounded theory as described in 1967 but reflect the varied developments in qualitative research methods as now practiced in 2020. These developments have come about because of these scholars' responsiveness to many difficult challenges and changes in the broader landscape of social science research, especially qualitative inquiry,

transnationally over recent years. These include Charmaz's (2000, 2006, 2014a) deep engagement with pragmatist constructivism, Corbin's (Corbin & Strauss, 2008, 2015) explications of Straussian grounded theory, and Clarke's (2003, 2005; Clarke et al. 2015, 2018) incorporation of discourse materials (narrative, visual, and historical) as data sources in addition to interviews and documents, along with new theoretical perspectives and situational mapping strategies. This volume also offers clarifications of Schatzman's dimensional analysis by Bowers and continuations of the work of Stern with Glaserian grounded theory by Porr.

Notes

1. Videos from the UK, available on YouTube:

Glaser: "The literature review in grounded theory."

www.youtube.com/watch?v=7S1kJ0k3yHk&list=PLNCas4ucmlWPDDcKr6QJPOL_Fl0jvzFmp&index=2&t=0s

"Jargonizing: Using the grounded theory vocabulary"

www.youtube.com/watch?v=r6RpQelvS1k&list=PLNCas4ucmlWPDDcKr6QJPOL_Fl0jvzFmp&index=2

"High impact dependent variables."

www.youtube.com/watch?v=WwR9K17kul0&list=PLNCas4ucmlWPDDcKr6QJPOL_Fl0jvzFmp&index=3

"Impact variables: Grounded theory is a study of a concept!"

www.youtube.com/watch?v=OcpxaLQDnLk&list=PLNCas4ucmlWPDDcKr6QJPOL_Fl0jvzFmp&index=4

Charmaz: "Description of grounded theory." www.youtube.com/watch?v=Es-PHU52qEE

"A discussion with Kathy Charmaz on grounded theory" (interviewed by Graham Gibbs).

www.youtube.com/watch?v=D5AHmHQS6WQ

"The power and potential of grounded theory" (keynote for the British Sociological Association, 2013). www.youtube.com/watch?v=zY1h3387txo

2. Videos available on YouTube:

Clarke: Video of talk titled "Qualitative Research and Postmodernism: The Examples of Grounded Theory and Situational Analysis," given in English by Adele E. Clarke at the Berlin Qualitative Workshops in 2011. There is a long introduction in German by Prof. Dr. Reiner Keller (University of Augsburg), who arranged for the German translation of *Situational Analysis: Grounded Theory After the Postmodern Turn* (Clarke, 2012). www.berliner-methodentreffen.de/archiv/video/closinglecture_2011/index.html

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