

DEVELOPING MIXED-METHODS

Anthropology has long been using mixed methods—which are inherent in ethnographic research (See Pelto, 2017¹). At the time I was conducting my dissertation research (1980-81) and conducted two projects: The childbirth (nursing) dissertation was qualitatively-driven, and the infant feeding dissertation (anthropology) was quantitatively-driven. At that time, I had not read Jennifer Greene's² et al. (1989) seminal work about mixed methods but had read about triangulation. Therefore, when I wrote the much cited article: Approaches to qualitative-quantitative methodological triangulation.³ I used the term "triangulation"—which of course should have been *mixed methods*. (Apologies, Jennifer). However, in this article, I developed the notation system that is used widely in mixed methods.

Both dissertation projects were *integrated* at the *results level*, and both were one project consisting of a qualitative core (Nursing, childbirth) and a quantitative core (in Anthropology infant feeding), so that when I commenced writing and teaching mixed-methods, I insisted that mixed-methods was a single method project, with added *qual* or *quan* supplements. Hence the hyphen, that is supposed to remind users that they are doing one method with strategies as supplements. Mixed methods (without a hyphen, I prefer to place in the category of *multiple methods*, as both "strands" are complete methods that stand on their own, and often published separately.

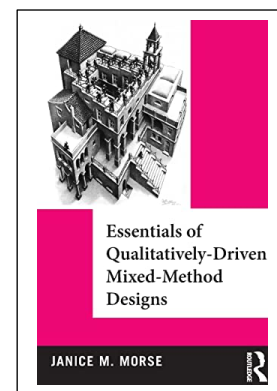
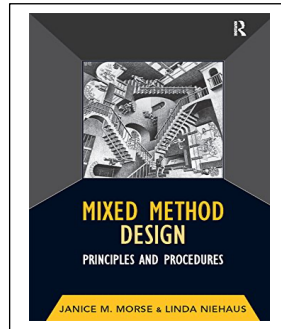
¹ Pelto, P.J. (2017). *Mixed methods in ethnographic research*. New York: Routledge

² Greene, J. C., Caracelli, V. J., & Graham, W. F. (1989). Toward a conceptual framework for mixed-method evaluation designs. *Educational evaluation and policy analysis*, 11(3), 255-274.

³ Morse, J. M. (1991). Approaches to qualitative-quantitative methodological triangulation. *Nursing Research*, 40(2), 120-123. Reprinted in 2008, *The Mixed Methods Reader*. (pg. 151-160.) Ed by Vicki L. Plano Clark & John W. Creswell, Thousand Oaks, CA: Sage.

In addition to the hyphen bit, I differ from other mixed methods researchers on several other important points, but I note they are coming to see things my way, but sometimes change the terms. Concepts I have introduced into mixed methods (mostly the 1991 article⁴) are:

- 1) *Theoretical drive*, also *Qualitatively-driven* and *Quantitatively-driven*;
- 2) *Pacing*
- 3) *Research narrative*
- 4) *Simultaneous +*
- 5) *Sequential* —>
- 6) *Core component*
- 7) *Supplemental component*
- 8) *Linking*
- 9) *Point of Interface*



In 2017, I made a plea for the lack of attention to qualitatively-driven mixed methods, and presently developing a new approach, *Inquiry-led mixed-methods*. *Inquiry-led mixed-method* will emphasize the malleability and inductive advantages of mixed-methods designs.

I taught mixed-methods at the PHD & post doc level from 2000-2006 at the University of Alberta; and from 2007-2020 at the University of Utah. Publications in mixed-methods include:

- Morse, J. M. (1991). Approaches to qualitative-quantitative methodological triangulation. *Nursing Research*, 40(2), 120-123. Reprinted in 2008, *The Mixed Methods Reader*. (pg. 151-160.) Ed by Vicki L. Plano Clark & John W. Creswell, Thousand Oaks, CA: Sage.
- Morse, J. M. (2003). Principles of mixed and multi-method research design. In A. Tashakkori & C. Teddlie (Eds.), *Handbook of mixed methods in social and behavioural research*. Thousand Oaks, CA: Sage.
- Morse, J. M., Niehaus, L., Wolfe, R., Wilkins, S. (2006). The role of theoretical-drive in maintaining validity mixed-method research. *Qualitative Research in Psychology*, 3 (4), 279-291.

⁴ See Morse, (2017) *Essentials of Qualitatively-driven Mixed-methods Designs*, p. 11.

- Morse, J. M., Niehaus, L. & Wolfe, R. (2005). The utilization of mixed-method design in nursing research. *International Nursing Review (Japanese)*, 28(2), 61-66.
- Morse, J. M., Wolfe, R., & Niehaus, L. (2006). Principles and procedures for maintaining validity for mixed-method design. In Leslie Curry, Renée Shield & Terrie Wetle (Eds.) *Qualitative Methods in Research and Public Health: Aging and Other Special Populations*. (pp. 65-78). Washington, DC: GSA and APHA.
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- Morse, J.M. & Niehaus, L. (2007). Combining qualitative and quantitative methods for mixed-method designs. In P. Munhall (Ed). *Nursing research: A qualitative perspective*. (4th ed). (pp. 5 41-554). Boston: Jones & Bartlett. Reprinted in Chinese Nursing Management Journal, [Chinese]10(7), 19-22. October 2007.
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- Morse, J.M. (2012). Simultaneous and sequential qualitative mixed-method designs. In P. Munhall (Ed.), *Qualitative Nursing Research* (5th ed., Chapter 24, pp. 535-570). Sudbury, MA: Jones & Bartlett
- Morse, J.M., & Niehaus, L. (2012). Combining qualitative methods for mixed-method designs. In P. Munhall (Ed.), *Qualitative Nursing Research* (5th ed., Chapter 25, pp. 571-584). Sudbury, MA: Jones & Bartlett.
- Morse, J.M. (2010). Pragmatics and procedures for mixed-method design: Maintaining control, rigor and complexity. In *Handbook of Mixed Method Design* (2nd ed) (Chapter 14.) (Ed by A, Tassakkori & C. Teddlie), Sage: Thousand Oaks, CA: Sage.
- Morse, J.M. (2010). Simultaneous and sequential qualitative mixed-method design. *Qualitative Inquiry*, 16(6), 483-491.
- Morse, J. M. & Niehaus, L. (2009). *Mixed-method design: Principles and procedures*. Walnut Creek, CA: Left Coast Press. Reprinted in Korean, 2013.
- Morse, J.M. & Maddox, L. (2014). Analytic strategies with qualitative components in mixed-method research. In *Sage Handbook of Qualitative Data Analysis*. (p. 524-539) Ed by Uwe. London: Sage.
- Morse, J. M. (2014). Qualitative Research. Mixed-Methods. Encyclopedia entries in *Ethics, Science, Technology: A International Resource*. (2nd ed). Alan Hedblad & Carl Mitcham (eds). Delaware: Engage Learning Inc.
- Morse, J.M & Cheek, J. (2014). Making Room for Qualitatively-Driven Mixed-Method Research. *Qualitative Health Research*, 24 (1), 3-5, doi:10.1177/1049732313513656
- Morse, J.M. (2015). Issues in Qualitatively-Driven Mixed-Method Designs: Walking through a mixed-method project. Chapter 12 (pg. 206-222), in *The Oxford Handbook of Mixed and Multimethod Research*, (ed by Sharlene Hesse-Biber & Burke Johnson). New York: Oxford.
- Morse, J. M. & Cheek, J. (2015). Introducing qualitatively-driven mixed-methods. *Qualitative Health Research*, 25 (6), 731-733, doi:10.1177/1049732315583299
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- Morse, J. M., Cheek, J., Clark, L. (2018). Data-related issues in qualitatively-driven mixed-method designs: Sampling, pacing, and reflexivity. (p. 564-583). *The SAGE Handbook of Qualitative Data Collection* (Ed by U. Flick). London: Sage Inc.
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- Cheek, J & Morse, J. (2022). The power of qualitative research in mixed-methods research designs. (Ch 38, pp.636-651). In *The SAGE Handbook of Qualitative Analysis* (Ed by U. Flick). London, UK: Sage Inc.
