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# Toward an Agenda for Evaluation of Qualitative Research

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## Abstract

Evaluation is essential for research quality and development, but the diversity of traditions that characterize qualitative research suggests that general checklists or shared criteria for evaluation are problematic. We propose an approach to research evaluation that encourages reflexive dialogue through use of an evaluation agenda. In proposing an evaluation agenda we shift attention from rule-based judgment to reflexive dialogue. Unlike criteria, an agenda may embrace pluralism, and does not request consensus on ontological, epistemological, and methodological issues, only consensus on what themes warrant discussion. We suggest an evaluation agenda—EPICURE—with two dimensions communicated through use of two acronyms. The first, EPIC, refers to the challenge of producing rich and substantive accounts based on engagement, processing, interpretation, and (self-)critique. The second—CURE—refers to the challenge of dealing with preconditions and consequences of research, with a focus on (social) critique, usefulness, relevance, and ethics. The seven items of the composite agenda EPICURE are presented and exemplified. Features and implications of the agenda approach to research evaluation are then discussed.

## Keywords

checklists; communication; epistemology; qualitative methods; general; research evaluation

Empty is that philosopher's argument by which no human suffering is therapeutically treated. For just as there is no use in a medical art that does not cast out the sicknesses of bodies, so too there is no use in philosophy, if it does not throw out suffering from the soul. (Epicurus, as quoted in Nussbaum, 1994, p. 102)

The field of qualitative research has been described as one defined primarily by tensions, contradictions, and hesitations (Denzin & Lincoln, 2005, p. xiii). Such a sweeping statement warrants discussion, but reflects a commonly held view that there is little that unites qualitative researchers except the assumption that they are not doing quantitative research. What this implies is described in various ways, some focusing on differences in method, others on more basic differences in world views and theories of knowledge. For instance, qualitative research might be informed by notions of "truth," referring to correspondence with reality, or by notions of "rightness," referring to interpretive coherence or consequences of purposeful action.

Evaluation of qualitative research thus relates to central philosophical discussions on themes such as objectivism and relativism, realism and constructivism, and knowledge

and human interests (see Bernstein, 1983; Habermas, 1968/1973; Skjervheim, 1959/2000). Our purpose with this article is to propose a practical approach to evaluation that acknowledges the pluralism of current qualitative research and encourages reflexive dialogue in the evaluation process.

Given our academic backgrounds, the examples we give are predominantly from qualitative health research, yet the challenge of criteria and the agenda approach that we propose is a more general one, that we believe is relevant for various traditions of research. The fact that qualitative research could hardly be described as a united approach to inquiry does not imply that it is a collection of unrelated practices, or that there are no relationships to practices of quantitative research.

One way of discussing such similarities and differences has been to discriminate between various paradigms, such as positivism, postpositivism, constructivism, and

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participatory action frameworks (see Guba & Lincoln, 2005).<sup>1</sup> Guba and Lincoln argue that paradigms have different quality criteria, such as, for instance, validity, reliability, and objectivity in the positivist and postpositivist paradigms, and congruence of experiential, presentational, propositional, and practical knowing in participatory action frameworks. This diversity relates to differences in worldviews and theories of knowledge. We do not discuss evaluation in relation to paradigms. Our purpose is to discuss themes that could be relevant across various traditions of research, not to propose the best criteria according to one specific paradigm or research tradition. Unlike criteria, an evaluation agenda might embrace pluralism, and does not request consensus on ontological, epistemological, and methodological issues, only consensus on what themes warrant discussion.

We proceed by discussing the challenge of criteria in qualitative research before clarifying the premises that have led us to propose the agenda approach to research evaluation. The seven items of the composite agenda *EPICURE* are then presented and exemplified before we discuss the features of the agenda and possible implications of using it.

### The Challenge of Criteria

Evaluation of qualitative research implies assessing the knowledge claims and the communication and contextualization of research findings (see Abrams, 2005; Blaxter, 1996; Bruscia, 1998; Carter & Little, 2007; Cohen & Crabtree, 2008; Elliot, Fischer, & Rennie, 1999; Engel & Kuzel, 1992; Kuzel & Engel, 2001; Malterud, 2001; Meyrick, 2006; Morse, 2003; Morse, Barrett, Mayan, Olson, & Spiers, 2002; Sandelowski & Barroso, 2002; Silverman, 2005; Smaling, 2002; Smeijsters, 1997; Smith & Deemer, 2000; Spencer, Ritchie, Lewis, & Dillon, 2003). Evaluation might stimulate development of future research, which is important in relation to the ethical obligation to serve people and communities, and might give the research disciplines and practices the degree of recognition they need to operate professionally. The autonomy of any research practice is at stake if the question of evaluation is not handled properly (Bourdieu, 2007). The multiplicity of worldviews and viewpoints described in the opening paragraphs suggests, however, that the field of qualitative research is diverse to a degree that challenges the legitimacy of general evaluation criteria. In the following we describe the challenge of criteria from several perspectives.

### Beyond Technical Fixes

Several lists of general criteria for evaluation of qualitative research do exist, for instance, as expressed in

the format of checklists. This might be, in part, because of influence from established practices within quantitative research (Morse, 2007). For example, when qualitative research was introduced in the *British Medical Journal* in the mid-1990s, it was first called “non-quantitative” research. Guidelines and checklists for evaluation of qualitative studies were developed in ways that did not diverge too much from established principles for evaluation of quantitative research. This might have had the advantage of communicating that qualitative research could also be rigorous, but several critical voices have emerged, suggesting the need for more fundamental discussions of how to evaluate qualitative research. Barbour (2001) has argued that although checklists might have contributed to acceptance of qualitative methods in medicine, they can be counterproductive if used prescriptively. She uses the term *technical fixes* to communicate that many reviewers in their use of checklists tend to focus on whether or not specific techniques such as purposive sampling, multiple coding, triangulation, and respondent validation have been applied. She then argues that technical fixes do not contribute to rigor and quality unless they are linked to an awareness of the underlying assumptions of qualitative research.

In our appraisal, this argument is warranted. The idea of checklists and fixed evaluation criteria implies a consensus about standards or rules functioning as the basis for judgment. The practice of rule-based evaluation is only defensible when the study to be evaluated is based on a corresponding epistemological foundation. But this premise is often not present in qualitative research. As described above, there are competing paradigms and perspectives in qualitative research, and considerable disparity in relation to values and worldviews. For qualitative research, then, the use of criteria might lead to the use of inadequate criteria and evaluation based on premises that are foreign to the specific study. This does not imply that we easily can do without criteria. As Thomas A. Schwandt put it,

The issue is deceptively simple: What is an adequate warrant for a subjectively mediated account of intersubjective meaning? . . . In the absence of some set of criteria, such accounts are subject to the charges of solipsism (they are only my accounts) and relativism (all accounts are equally good or bad, worthy or unworthy, true or false, and so on). (Schwandt, 1998, p. 246).

Responses to these challenges have varied greatly, and two quite different solutions have been promoted: the development of *local criteria* or *metacriteria*.

### Local Criteria and Metacriteria

In many ways it makes sense to argue that each research project deserves to be evaluated according to criteria defined by its own premises and purposes (Aigen, 1995; Carter & Little, 2007; Cohen & Crabtree, 2008). A problem with the idea of local criteria, however, is that it is used on several conceptual levels. Sometimes it is used in relation to research paradigms or epistemological positions, other times in relation to methodologies, theoretical traditions, specific projects, or various social or cultural contexts.<sup>2</sup> Also, the extensive diversity of existing traditions gravely complicates the idea of using local criteria. Methodology is often eclectic, and the number of research approaches and concurrent sets of criteria seem to multiply continuously. It is not practical to think that a reviewer should be equally updated and qualified in the latest criteria proposed in any branch of qualitative research. Even if these practical problems were solved, another more basic problem would remain: Using criteria that are idiosyncratic to each project or research tradition would obstruct a process in which different positions could challenge each other and produce healthy discussions about what high-quality qualitative research is.

To formulate metacriteria applicable to a broader range of studies and research traditions could be an alternative. We mention some examples: Bruscia (1998) has offered standards of integrity for qualitative research, focusing on methodological, personal, interpersonal, and aesthetic integrity. Popay, Rogers, and Williams (1998) have proposed the following interrelated criteria: interpretation of subjective meaning, description of social context, and attention to lay knowledge. Alvesson and Sköldbberg (2000) argue that quality in qualitative research is linked to systematics and techniques in research procedures, clarification of the primacy of interpretation, awareness of the political-ideological character of research, and reflection in relation to the problem of representation and authority. Malterud (2001) has argued that relevance, validity, and reflexivity could be considered overall standards for qualitative inquiry. Morse (2003) adopted Guba's (1981) suggestion of relevance, rigor, and feasibility as overall standards, and has linked this to the different components of a research proposal. Meyrick (2006) has proposed the two core principles of transparency and systematicity. Each of these (and several other) suggestions deserves further consideration, yet the simple fact that they are quite different reveals that any criterion is debatable. A limitation of metacriteria is also that they are too abstract for application in the evaluation of a particular study.

Both the use of checklists and the alternatives of local criteria or metacriteria have important limitations in

evaluation of qualitative research, then. Checklists easily lead to reviews using criteria alien to the study in question, local criteria might lead to fragmentation of the research field, and metacriteria might lead to a fuzzy practice of evaluation, as metacriteria, by definition, are abstract and general. Some authors arguing for the relevance of metacriteria have countered the latter critique by also developing concrete guidelines or checklists operationalizing the metacriteria (Malterud, 2001). However, as soon as specific checklists are formulated, the problematic relationship between fixed criteria and a heterogeneous field pops up again.<sup>3</sup>

This conundrum could hardly be resolved by attempts to formulate new and better lists of evaluation criteria. As an alternative, we propose an approach to research evaluation that acknowledges pluralism and encourages reflexive dialogue. Researchers might agree about what to discuss even though their positions in specific ontological, epistemological, and methodological debates vary in many respects. We therefore propose an evaluation agenda which—if used with reflexivity—could bypass the rigidity of checklists, the isolationism of local criteria, and the vagueness of general standards or metacriteria.

### Toward an Evaluation Agenda

Although neither local criteria nor metacriteria can resolve the conundrum described above, both responses to the challenge of criteria embody important insights. Proponents of metacriteria suggest that qualitative research is informed by some general norms that have been developed across academic disciplines and research traditions over a long period of time. Proponents of local criteria suggest that evaluation of any research project is situated; that is, it is tied to a specific social, cultural, and academic context. We link these two insights to epistemological discussions on how qualitative research could be reflexively integrated through dialogue.

The situated use of an evaluation agenda dealing with the challenge of producing rich and substantive accounts related to preconditions and consequences of research is the alternative path to evaluation that we propose. In reviewing the qualitative research literature, we find that there are several contributions that point in this direction. A number of authors have argued that the evaluation of qualitative research must acknowledge pluralism (Alvesson & Sköldbberg, 2000; Angen, 2000; Koro-Ljungberg, 2008), and therefore requires a flexible framework instead of fixed criteria (see Cohen & Crabtree, 2008; Yardley, 2000, 2007).<sup>4</sup>

For instance, Aigen (1996) argued that standards developed for evaluation should not be considered as rules to be followed, but as tools that could be used to

better understand why some studies are interesting and useful and why others seem to be of more limited value. In discussing what constitutes the value of a study, Aigen focuses upon *appropriate representation* and *usefulness* (potential for application, relevance, and interestingness). Malterud has argued that “qualitative methods are founded on an understanding of research as a systematic and reflective process for development of knowledge that can somehow be contested and shared” (Malterud, 2001, p. 483). Kvale has presented the concepts *communicative validity* and *pragmatic validity*, implying that qualitative studies should be evaluated not only within a traditional academic framework on trustworthiness but also on the capacity of the developed knowledge to be understood and implemented (Kvale, 1996). The latter claim might be related to a request for a “qualitative science policy” (Mitcham, 2007); that is, to demonstrate both the cognitive powers and the practical benefit of qualitative research.

### Stories That Make a Difference

The above formulations suggest that the task of understanding is inevitably linked to our situatedness as human beings and our participation in a physical, social, and ethical world. From this perspective, the trustworthiness of a qualitative study could not be separated from its situatedness. In proposing an evaluation agenda, we argue that attention should be drawn to the situated processes of developing rich and interpreted accounts or stories and to the capacity of these stories to facilitate change. We suggest that these two dimensions of an evaluation agenda could be communicated through use of two acronyms: EPIC and CURE. The first cluster, EPIC, refers to the challenge of producing substantive stories based on *engagement* with a phenomenon or situation, *processing* of empirical material, *interpretation* of the evolving descriptions, and *critique* in relation to research processes and products. The second cluster, CURE, refers to the challenge of dealing with preconditions and consequences of research, with *critique*, *usefulness*, *relevance*, and *ethics* related to social situations and communities. Our arguments above indicate that neither of these two dimensions can be seen in isolation. Therefore, we have chosen to integrate them in the compound acronym EPICURE.

An acronym communicates an accessible framework and might thus enhance dialogues among researchers and participants, as well as among researchers and reviewers, throughout the research process. The choice of the specific acronym EPICURE is a practical one, but it is not arbitrarily chosen. The items included have been developed from careful review of the literature, and the two

subacronyms EPIC and CURE represent the two dimensions we have outlined. The compound acronym is perhaps less direct in semantic associations, but with some generosity in interpretation we take it as a reminder of the importance of reflexive and critical humanism in qualitative research.<sup>5</sup>

### Reflexivity and Dialogue

We have described how the evaluation agenda we propose relates to a review of the qualitative research literature, and we have briefly described the items of the agenda. Before we present details of the agenda, we shall elaborate on philosophical contributions that have informed the proposal. We focus our presentation on Dewey's (1929, 1938) philosophy of science, but hastily add that we do not think of this as a general philosophy of qualitative research. That would speak against the arguments we made above about the need to acknowledge pluralism.<sup>6</sup> We do not use Dewey, then, to support specific claims about what constitutes solid and relevant knowledge, but rather to clarify the idea that evaluation might be linked to dialogue and shared reflection.

In our context we first focus on Dewey's general claim that standards for the evaluation of research arise and gain authority through a tradition (Dewey, 1929, p. 12). The pragmatist further holds, however, that historically effective evaluative standards might have normative force beyond any actual research community (Dewey, 1938, pp. 16-18). The process of articulating general standards for evaluating research could be qualified as a dialogue with past, present, and future inquirers in their capacity of being evaluators of their own research processes and results.

Dewey's philosophy of science would support the postempiricist conception of the situatedness of all research (see also, Haraway, 1988). His focus is on the research process; any production of knowledge claims is conditioned by a process of transforming, conceptually and practically, an indeterminate or conflicting situation of an ultimately prescientific origin (Dewey, 1938, pp. 104-107). This suggests that what a specialized inquiry is ultimately about is apprehended through the inquirer's precognitive background (Dewey, 1938, p. 179). Moreover, such situations are seen as preconditions for the temporally extensive process of articulating an inquiry's subject matter into factual and conceptual contents (Dewey, 1938, pp. 118-119), and for the application of the latter in formulating research problems and developing knowledge claims in response thereto (1938, p. 107).

To describe research as situated implies that the process of selecting and weighing observable and recordable material as data is one of interpretation, of judging and

appraising the material. The selection at stake has a generalization or hypothesis as its antecedent as much as its consequence (Dewey, 1938, p. 498). The process of interpretation might explicitly or implicitly be theoretically informed, but it is the applicability to situations of interest that makes theoretical discourse meaningful in the first place (Dewey, 1938, p. 68). Such applicability is conditioned by value-oriented questions presupposed rather than explicitly asked by the researcher as a member not only of a specialized research group, but of a larger social community. Bringing such questions out in the open, to reflect on and criticize their legitimacy and relevance, should be the constant task of any researcher. A research process thus implies both self-critique and social critique.

Here, the privileged role of questions comes to the fore: Although to inquire is generally to “provide an answer to a question asked” (Dewey, 1938, p. 105), articulated research questions and theoretically informed answers thereto are ultimately conditioned by a prescientific questionable situation (Dewey, 1938, p. 105). Because the situatedness of a research process has a prescientific origin, a reflection on the conditions for developing and testing knowledge claims can be no mere methodological affair. Moreover, reflexivity is not a matter of methodological control but about articulating questions tacitly underlying and motivating research, and of evaluating their legitimacy and relevance. Although such reflexivity would have a certain dialogical structure, or a structure of question-and-answer (see Gadamer, 1960/2004, pp. 356-371), virtually engaging a whole research community, Dewey focuses on how such articulation might be because of selective interests on the part of the individual researcher who is “differentially sensitive to some qualities, problems, themes” (Dewey, 1929, p. 216). Each individual researcher carries unique skills and intellectual and moral priorities into the research community. Through each researcher’s engagement with her research topic, the community is thus enabled to articulate, question, and criticize preconceptions from different perspectives. Accordingly, a truly reflective inquiry requires individual and collective efforts to articulate various attitudes to the subject matter under study (Dewey, 1929, p. 218).<sup>7</sup>

Still, an overarching theme for a dialogical articulation of reflexivity is the interaction between research and other cultural practices. In Dewey’s terms, “Every inquiry grows out of a background of culture and takes effect in greater or less modification of the conditions out of which it arises” (Dewey, 1938, p. 20). Hence, normatively qualified, a reflexive dialogue should guide the researcher’s articulation of the ways in which the research and its public consequences might prove legitimate and useful, given the social or moral issues that come into play.

## The EPICURE Items

In proposing an evaluation agenda we shift attention from rule-based judgment to reflexive dialogue. We present the individual items of the agenda in a four-fold format: First, we give a short description of the item and a metatheoretical context.<sup>8</sup> Second, we contextualize the item in relation to qualitative research. Third, we present an example of a published study that illuminates how the item could be dealt with. Fourth, we exemplify the kind of issues of evaluation that might be at stake in relation to the specific item.

### *E Is for Engagement*

Engagement refers to the researcher’s continuous interaction with and relationship to the phenomenon or situation studied. This item could be drawn from the radical empiricism of pragmatists such as William James and John Dewey, or from the discussion of understanding as engagement with the world, as discussed in hermeneutics by Hans-Georg Gadamer and others. As with the subsequent EPICURE items, this item is relevant in different ways, depending on the research tradition in question. For instance, ethnographers would usually stress prolonged participant observation, whereas discourse analysts would stress careful interaction with textual material.

In qualitative research in which the researcher has a personal involvement, his or her experience and subjectivity become part of the study. For the researcher’s situatedness not to become an adverse bias where preconceptions are confused with findings, a convincing level of reflection is required. The value of qualitative research therefore relates to reflexivity in the sense of regarding the nature and impact of the engagement. Sensitivity of and reflection on the researcher-as-instrument is thus asked for. For example,

Aigen (2002) studied popular music styles as the basis for clinical improvisation in a music therapy process with a young man with significant disabilities. The study illustrates how this young man develops from being able to sustain only fleeting moments of musical participation to taking part in collaborative improvisations in an organized and expressive manner. In describing this development, Aigen portrays his role as participant observer and cotherapist, and reflects on the contact between researcher and participant. Aigen also reflects on how the researcher’s engagement with the area of study could be reflected in the presentation of the study.

Evaluation of engagement might involve reflections on the researcher's access to the field or phenomenon studied; his or her motivation and preunderstanding; the capacity to participate, relate, and reflect; and the possibility of prolonged or repeated engagement in the service of the development of context sensitivity. Awareness of emerging understandings that might affect continued engagement is also called for.

### *P Is for Processing*

Processing refers to the process of producing, ordering, analyzing, and preserving empirical material. Because research implies reporting, processing involves the process of writing as well. Processing requires precision, thoroughness, and systematic effort. Qualitative research traditions vary considerably in relation to how and how much this point is stressed, with some of the more rigorous approaches being grounded theory and certain versions of phenomenological research. Researchers using constructivist approaches to qualitative research might argue that language is not a transparent medium mirroring the world, and that the research report is not a factual picture of the field but a construction of it. This does not diminish the value of systematic and precise processing, but suggests that this be seen in relation to the reflexive acknowledgement of the partiality of any account, for instance because of theoretical and pretheoretical assumptions.

In disciplines in which readers of research reports are accustomed to the rigor of quantitative research, rigorous processing of qualitative studies might be important for communicative reasons. For this very reason, it might also be important to challenge the idea of method as the main arbiter of truth and value. Appraisal and contextualized judgment are involved in processing. It should also be noted that experiences and interactions might involve aspects that are not easily described in language, such as movement, nonverbal communication, and aesthetic experiences. Processing might therefore involve the use of audio and video data. For example,

Nessa (1995a, 1995b) developed a method for transcribing the doctor–patient dialogue reflecting the interactional processes of the consultation. Using audiotape recordings from consultations in general practice, he applied pragmatic theory to process the discourse into a synopsis where linguistic and paralinguistic actions and their consequences could be identified and made accessible for analysis. The interpretation of what was going on was therefore positioned in a theoretical framework, and the context of discourse was presented in a workable format.

Evaluation of processing requires reflexivity in relation to the context-sensitive development of focus and perspective, as well as procedures for data production, analysis, and presentation. The following questions exemplify issues that could be reflected upon: How is the research focus clarified (e.g., in relation to the purpose of developing descriptions, concepts, or theory)? How is the empirical material systematized, analyzed, and presented? Are the researcher's position and perspective clarified? How is the empirical material processed and presented, textually and through other expressive media?

### *I Is for Interpretation*

Interpretation involves the act of creating meaning by identifying patterns and developing contexts for the understanding of experiences and descriptions. According to philosophical hermeneutics, any description is already an interpretation within a certain context. This insight has been carefully explored in the tradition of ethnographic research, for instance, where Clifford Geertz has employed the term *thick description* to suggest that to add details and rigor to descriptions of what is seen or heard in itself does not lead to understanding; you need to add descriptions of contexts in which events, experiences, and processes can be understood (see Geertz, 1973/1993, Chapter 1).

Qualitative research often involves the problem of double hermeneutics; the researcher interprets situations in which the involved participants are already involved in interpretations of the same situation, and they might also engage in interpretations of the researcher and of the researcher's interpretations (see Giddens, 1986/1989, p. 284). Some studies also involve other complexities. In qualitative health research, for instance, some participants might not have access to language for description of their own situation (e.g., patients in coma or children with language problems). Also, some situations to be interpreted might be quite extreme because of pain, suffering, and emotional distress. For example,

Ridder and Aldridge (2005) studied individual music therapy with persons with frontotemporal dementia. In the study they explored how a psychosocial intervention such as music therapy could supplement pharmacological treatment, and the authors explored various levels of interpretation based on the processing of empirical material. Three levels of interpretation are discussed: experience (of a phenomenon), description of the experience, and understanding the experience in relation to various discourses (including academic theories). At the second level of interpretation

(according to this taxonomy), the researchers used qualitative descriptions as well as physiological data. These were then brought together at the third level, as an interpretation of “what happened.” In this interpretation, the researchers argue that songs with personal meaning make it possible to acknowledge the person’s emotions, to break social isolation, and to meet the music therapy participant’s psychosocial needs.

Evaluation of interpretation starts with appraisal of the choice of focus and the production of empirical material. Later on in the research process, interpretation is prominent in the process of analysis and requires reflexivity in relation to preconceptions and theoretical frame of reference. Issues to discuss include the possibility of multiple interpretations and why and how certain interpretations could be more adequate for the purpose of the study than others. The degree of consistency between low-abstract and high-abstract interpretations might need to be discussed, with a focus on how the researcher’s theoretically informed interpretations relate to the involved participant’s own interpretations of his or her situation.

### *C Is for Critique*

Critique refers to the appraisal of merits and limits of research.<sup>9</sup> In our agenda, this item has a double notion: self-critique as well as social critique. In relation to self-critique, critical and reflexive approaches to the researcher’s positions and perspectives have been pioneered by post-modern and feminist theorists of science. In relation to social critique, research traditions inspired by critical theory, feminism, and postcolonialist theory have been particularly important, focusing on problems of power and privilege. These traditions are based on the assumption that all research is situated in social and political contexts.

Self-critique is relevant in all qualitative studies, because the researcher-as-instrument is central. In some fields, such as in qualitative health research, the subitem might be of special relevance, because health care systems usually bestow professionals and researchers with considerable authority and power. For example,

Based on a self-critical appraisal of how her previous work with teenagers with severe behavioral and/or emotional disorders had been directed toward effecting changes in observable and measurable behavior only, Gardstrom (2004) investigated meaning in clinical music improvisation. In processing the musical improvisations it became apparent for the researcher that analysis of this material would not be a sufficient basis for interpretation of what

was meaningful for participants. She therefore revised her research questions, allowing for an exploration of relationships between how participants used the various musical elements and how they talked about the improvisations. Gardstrom also critically examined similarities and differences in client experiences and therapist/researcher experiences of meaning.

Evaluating the self-critical aspects of a research study requires careful examination of whether the researcher demonstrates reflexivity in relation to individual items such as engagement, processing, and interpretation, and also whether the relationships among these items have been examined carefully.

The degree to which research is or could be understood as social critique varies considerably. In traditions such as participatory action research, the underlying assumption is that research should empower participants and contribute to social change. This ambition could hardly work as a general principle for all qualitative studies, but some awareness of the issue of social critique could be requested. In studies that do not explicitly strive for social change, researchers should at least do what they can to prevent their research from contributing to repression and disempowerment. For example,

Interviewing women with chronic pain about encounters with their doctors, Werner and Malterud (2003) applied a gender perspective to understand the nature of “work” done by the patients to be believed, understood, and taken seriously when consulting the doctor. Their efforts reflected a subtle balance not to appear too strong or too weak, too healthy or too sick, or too smart or too disarranged. Attempting to fit in with normative, biomedical expectations of correctness, they tested strategies such as appropriate assertiveness, surrendering, and appearance.

Evaluating whether or not a study contributes to positive social change or to repression and disempowerment is especially demanding, as the implications and consequences of a study usually are not fully known at the time of evaluation. The researchers’ reflexivity in relation to these issues could be evaluated, however. This is perhaps especially important when researchers focus on social change, as there is always the risk of paternalism when researchers want to emancipate “on behalf of” participants.

### *U Is for Usefulness*

With usefulness we refer to value in relation to practical contexts. This item relates to principal reflections on the

prescientific conditions for knowledge, as discussed in the presentation of aspects of Dewey's philosophy, above. It also relates to the more concrete challenge of producing knowledge that could be applied in everyday settings. We propose this item to reflect not only the immediate implementation of the knowledge developed but also new and enhanced understanding. Usefulness thus does not in itself signal a narrow instrumental utility focus.

Usefulness focuses on the impact of the qualitative study in relation to real-world problems in various ways. In qualitative health research, for instance, this is relevant for various actors in the "health action field," such as agencies and decision makers, professional groups, and patients and participants. The interests of these actors are not always overlapping, so relationships between the items of critique and usefulness will need to be examined. For example,

Chronic pain has been regarded as a medical problem with few solutions or cures. Steihaug, Ahlsen, and Malterud (2001) approached this challenge by developing treatment groups aiming to give women patients a tool for handling their chronic state of pain. The program was adjusted along the way to fit the needs experienced by the participants. The focus was shifted from exercise and education to movement and interaction in an action research design.

Evaluation of usefulness might include critical reflection in relation to issues such as: What are the cultural and social conditions enabling the development of the study? How are the research process and products useful for practice and understanding in relation to real-world problems and situations? How is it useful for participants, professionals, agencies, and policy?

### *R Is for Relevance*

Relevance, as the term is used here, refers to how the study contributes to development of the involved discipline(s) or interdisciplinary field. As illuminated by the tradition of hermeneutics (Gadamer, 1960/2004), any question is based on some preunderstanding, and it is plausible to claim that any research question relates to the existing knowledge in a discipline or academic field. Researchers therefore need to reflect on how the study contributes with new knowledge or original perspectives. This item, then, illuminates how any research study is linked to discourse and an "(inter)disciplinary context.

Even though qualitative researchers sometimes argue that their studies are inductive in nature, existing disciplinary knowledge will inform problem formulation,

processing, and interpretation in various ways. The relevance of the study for the involved discipline(s) could then be examined. In some research fields, such as qualitative health research, assessing relevance is especially complex, because the issues are inherently multidisciplinary. Each discipline and academic field brings certain perspectives and values to a study, and to acknowledge the relevance of a study one must be aware of the various disciplinary contexts and the conflicts of perspectives and values that might be involved. For example,

Although menopause in the medical literature has been conceptualized as a negative aspect of life, Hvas (2001) used an open-ended questionnaire to ask women about the course of menopause. The answers varied from unspecific statements describing a period of well-being or simply a statement of not having problems at all, to concrete descriptions that primarily dealt with the relief of ending menstruation and its related problems, such as PMS (premenstrual syndrome) and fear of pregnancy. Finally, they dealt with the possibility of personal growth and freedom to concentrate on their own requirements. Taking these findings as a point of departure, Hvas recommends that doctors include positive aspects and women's own resources in counseling, to avoid medicalization and disempowerment in this period of life.

Evaluation of relevance might include discussion of issues such as: How does the study fit within relevant literature? How is the study original and pertinent for the development of a discipline's or multidisciplinary field's understanding and body of knowledge?

### *E Is for Ethics*

Ethics refers to how values and moral principles are integrated in the actions and reflections of research. Research is informed by principles such as justice, fidelity, veracity, and the striving for excellence. The item of ethics could be drawn from Dewey's (1929, 1938) argument about how theory and research are inextricably linked to socially and morally questionable situations, and the item has also been given significant consideration in traditions inspired by critical theory, feminism, and postcolonialist theory.<sup>10</sup>

In qualitative research it is essential to prevent situations in which the research process and the publication of results harm participants and their communities. This might be a subtle and complex issue to assess, because ethical dilemmas often are more linked to conditions for

dignity and mutual respect than to concrete possibilities of harming someone physically or legally. The situated and normative basis for qualitative research suggests that the researcher's reflections could go beyond the issue of not doing harm to embrace the interest in if and how a study could support and benefit people and communities. For example,

In a study aiming to explore the experiences of psychiatric patients living in six rural communities in Norway, Thesen (2001) developed a research design aiming to accommodate experiences of people from a marginalized group. A "knowledge workshop" was set up to provide a safe discourse in which the traditional power differentials could be challenged. In this context, participants gave strong accounts describing the process and state of being reclassified as a stigmatized "other," including isolation and loneliness, low self-esteem, lack of paid work, lack of money, discrimination, and harassment. Other consequences included altered behavior from others, lack of necessary conditions for empowerment, and the danger of becoming visible as mentally ill.

Evaluation of ethics in qualitative research can involve reflections on the following issues: Is the research process respectful to all participants? Does the researcher demonstrate awareness of consequences of the research? How are issues such as confidentiality and informed consent handled? There are also ethical dilemmas to reflect on at methodological and epistemological levels. For instance, what are the relationships between those who tell (participants) and those who write (researchers)? To what degree does the study reflect the diversity of interests and perspectives in the group of participants? The final item of the agenda might therefore—together with the central item of critique—have an integrative function in that the relationships between the various items are considered.

## Discussion

Within the tradition of peer reviewing there are currently few tools to ensure a reasonable match between the qualitative study to be evaluated and the criteria used for evaluation. For the purpose of developing a shared focus for dialogue and discussion on quality in qualitative research, we have launched the evaluation agenda EPICURE, focusing on engagement, processing, interpretation, and critique in relation to empirical materials, and critique, usefulness, relevance, and ethics in relation to sociocultural and academic fields.

## Features of EPICURE and Its Items

The proposed acronym is based on the premise that reflexivity is central in qualitative research. Reflexivity is not one of the items of the agenda we propose, but a crucial qualification for making constructive use of it.

In use of the agenda, critique is the overlapping item of the two dimensions EPIC and CURE. As Paulo Freire (1968) advocated, social critique requires self-critique. We relate this to the request for reflexivity: Researchers acknowledge that they are not separated from the field they study; they are themselves positioned in it and must therefore reflect on this position, which includes self-inquiry and examination of the assumptions guiding the research process (see Bernstein, 1983; Steier, 1991). Because reflexivity also involves communication and collaboration (Finlay & Gough, 2003), research must be considered in relation to the social, cultural, and academic field that the specific project belongs to (Stige, 2002). This is different from saying that research studies are products of context. Research is part of social and cultural fields, but if an academic culture of evaluation and critique is nurtured, it is so with a certain degree of autonomy (Holst, 2005).

An agenda does not need to be faultless as long as it fosters dialogues that can help clarify important issues. We have tried to communicate this idea in the way we present the seven themes of the agenda. We do not present exact definitions, but refer to examples and previous and ongoing debates. Just any agenda would not do, however. The agenda communicated by the acronym EPICURE is intended to be integrative at a practical and philosophical level, embracing empirical, interpretive, constructivist, and critical dimensions of the development of knowledge.

A study would usually not be judged equally solid in relation to all seven points of the EPICURE agenda. We could imagine a situation in which some studies would focus on EPICure, and others on epiCURE or EPicURE. For instance, one study might focus on interpretation and critique to a degree that makes it somewhat less developed in relation to processing. This is not necessarily a weakness, because it would allow for more time spent on critical interpretations in the research process. No researcher is doing very well if the study is based on lack of processing of the empirical material, however, so the proposed evaluation agenda could be read as a request for balance and examination of the strengths and weaknesses of any study.

The second item of the CURE cluster—usefulness—deserves specific consideration. As expressed above, the inclusion of this item does not in itself suggest an instrumental focus. The growth of "mode 2" or "post-academic" research (see Gibbons et al., 1994) has to some degree

destabilized the relationship between academic institutions and utility-oriented research-and-development departments (see Ziman, 2000). In the language of the EPICURE agenda, this could be described as a disputed cultural shift with increased interest in practical usefulness and diminished interest in academic relevance.<sup>11</sup> In our appraisal, this cultural shift suggests that usefulness is an important part of an evaluation agenda, so that the positions of different stakeholders could be identified and discussed. Our inclusion of usefulness in the agenda therefore does not imply a simplistic, postacademic utility focus. Usefulness involves more than implications of a study for policy and practice; it is related to items such as interpretation, social critique, and relevance.

### *How Can the Idea of an Agenda Make a Difference?*

By using the notion of *agenda*, we want to challenge the conventional evaluation hierarchy in which experts evaluate texts based on explicit or implicit criteria. An agenda allows a more mutual approach, mediated by dialogue. We should not fool ourselves into believing that this will put power dynamics out of play. Still, an explicit agenda would have the advantage for researchers that they would be able to speak up in relation to an open list of issues. The roles of researchers and reviewers are of course not equal, but an agenda promoting a dialogic process of evaluation would invite reviewers to position themselves and would therefore require reviewer reflexivity.

In preparing the dialogue and discussion that the agenda approach to evaluation allows for, the researcher might identify relevant issues in relation to each item and describe procedures and processes that have addressed these issues. Exactly how and when in the research process the agenda should be used must be decided in relation to each evaluation context. It will probably be more helpful to think of the agenda as a flexible guide than as a fixed list of issues to be discussed.

In some cases an open dialogue characterized by turn taking, back-and-forth discussion, and clarification of pertinent themes is not only thinkable, but relatively common. The oral defense of a proposal or dissertation exemplifies such a situation. But also, review processes that today are usually characterized by expert decision could be developed in the direction of the dialogic reflexivity that an agenda such as EPICURE suggests. A peer-reviewed journal, for instance, could create procedures of evaluation that are more or less dialogic, wherein the reviewers and editors are not experts appraising texts by application of given criteria, but could create situations of reciprocal learning. The agenda can organize the discussion around certain themes that the parties have agreed upon.

We regard evaluation as a continuous process, and the agenda allows for awareness and dialogue with consultants, collaborators, and peers throughout the research process. Although much of the evaluation dialogue might be more important for the research process than for the product, it is essential to document reflexivity in the final report. For publication in journals with very tight word limits, this might be difficult to achieve, but some journals are receptive to longer articles and/or alternative media of communication. The use of Internet and electronic publication might be important in this respect. Although we argue that reflexivity must be documented, we would not necessarily recommend extensive reporting of every possible aspect of every item, as that could easily take the agenda closer to the rigid quality of a checklist. Reflexivity is not documented just by telling; it also involves showing (in the style and quality of writing).

### **Implications**

Because an evaluation agenda invites dialogue rather than expert decision, it should empower researchers and thus potentially lead to innovation, but it should also support readers and reviewers in developing constructive critique. The use of an agenda requires that the evaluator is qualified in qualitative research and willing and able to enter a dialogic process that requires reflexivity. Therefore, the agenda approach might require a rethinking of which competencies are essential for participation in evaluation processes.

The idea of an evaluation agenda suggests that the parties should be free to bring in new items to the degree it makes sense in the given situation. In other words, the agenda should be open and not used technically as a universal template for evaluation. Disagreement about an agenda such as those communicated by the acronym EPICURE could in itself be fruitful for qualitative research, as it could stimulate metatheoretical debate and promote future refinement of theory, research, and practice.

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The first author began developing ideas for an agenda for evaluation of qualitative research while working as the founding editor of *Nordic Journal of Music Therapy*.

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## Notes

1. This usage of the term *paradigm* is possibly inspired by Kuhn's (1970) philosophy of science, but focuses on articulated worldviews, whereas Kuhn focused more on the implicit and tacit premises of all research.
2. Carter and Little (2007) and several other authors make convincing arguments about the importance of internal consistency in a research study concerning choice of epistemology, methodology, and method. These arguments do not alter our appraisal that the idea of local criteria cannot resolve the challenge of criteria.
3. As Wittgenstein (1953/1967) has demonstrated, in applying explicit rules on a concrete case there will be an endless regress, since one will need new rules for interpretation of the rules applied in relation to that case.
4. These discussions might be related to more abstract discussions of how various metatheoretical perspectives might sensitize and challenge each other fruitfully (see Bernstein, 1983; Rosenau, 1992). Although the multiplicity of perspectives that characterize qualitative research might create specific problems, such as the challenge of criteria, it could be argued that multiplicity is a resource if pluralism is embraced.
5. Current popularized usage of the term *epicure* suggests something close to crude sensualism, whereas the ethics advocated by Epicurus (341–270 B.C.) stressed the value of simplicity and temperance in human attempts at maximizing pleasure and minimizing pain (see Konstan, 2005; Sedley, 1995). Epicurus argued that Aristotelian ethical arguments are “empty” and useless because they are not sufficiently committed to the relief of human misery. The work of Epicurus could therefore be considered an invitation to critical humanism (see Jensen, 2002; Nussbaum, 1994). In this light, the acronym EPICURE could remind us about the challenge of understanding health in relation to human experience in context.
6. The many different traditions of qualitative research have been informed by various philosophies of science. For instance, traditions such as grounded theory (Strauss, 1987, pp. 5-6) and action research (see Johansson & Lindhult, 2008; McKernan, 1987) have turned to John Dewey's (1938) pragmatistic philosophy of science, interpretive ethnography (Geertz, 1973/1993), to the hermeneutics of Gadamer (1960/2004) and some more recent “destabilizing” research traditions to various

postmodern philosophers (see Rosenau, 1992). It is, of course, beyond the scope of this article to describe and discuss this range of influences on the understanding of knowledge, truth, and value in qualitative research.

7. Sharing the understanding of the research process is essential for this purpose (Malterud, 1993).
8. The metatheoretical context given for each item is not comprehensive. Our purpose in describing relationships to metatheory is to illuminate relevant contexts for discussion of the items we propose. The range of metatheoretical influences informing the agenda reflects the pluralism of qualitative research traditions.
9. According to Robert Merton (1942/1973), critique in the form of “organized skepticism” is a central feature characterizing all research.
10. See Christians (2005) for a discussion of ethics and politics in qualitative research.
11. For instance, the tension between utility and academic autonomy represents a central challenge in current qualitative health research, not least because of the prominence of evidence-based medicine (see Kristiansen & Moonet, 2004; Morse, 2006).

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