



Going deeper with documents: A systematic review of the application of extant texts in social research on forests

Meike Siegner*, Shannon Hagerman, Robert Kozak

The University of British Columbia, 2424 Main Mall, Vancouver, BC V6T 1Z4, Canada



ABSTRACT

Qualitative research methods have become increasingly popular among scholars that investigate complex problems at the forest-society interface. However, these methodological strategies are oftentimes not well described in published accounts. This is particularly evident in the growing body of work that relies on document analysis. In an effort to address this shortcoming, this article introduces a typology for the use of documents in qualitative inquiry and examines and analyses how researchers make use of and report on the study of documents in qualitative inquiry involving forests. The analysis is underpinned by a systematic review of the literature, covering the period from January 2007 to June 2017. When applying our typology to the results of the analysis, we find that most studies use a triangulation approach for the study of documents. We further find that there are untapped opportunities for engaging more deeply with documents in terms of “object of research”, in which closer attention is paid to the role and function of documents within specific forest contexts. We further emphasize that there are untapped opportunities for more detailed reporting of methods, aimed at enhancing understanding of qualitative methods in a field marked by interdisciplinary research efforts. This review serves as useful resource for encouraging the application and discussion of qualitative research methods, and document analysis in particular, as a tool to leverage the study of pressing, interdisciplinary issues surrounding the world's forests.

1. Introduction

From deforestation to ensuring livelihoods and sustainable use, to the equitable sharing of benefits, many of the world's most pressing global challenges facing society involve forests (Diaci et al., 2011; Panwar et al., 2015; UN, 2016). At their core, these challenges have a central social component — driven by people with diverse motivations, values, degrees of power and preferred outcomes. Accordingly, the field of forestry in the 21st century has evolved and expanded from a primary emphasis on natural sciences and economics to also include research drawn from perspectives in anthropology, environmental history, sociology and human geography (Field and Burch, 2013; Hagerman et al., 2010; Innes, 2005; Nunez-Mir et al., 2016). Enhanced interest in the social study of forests has spurred calls for greater recognition of qualitative research methods (McLean et al., 2007; Schelhas et al., 2003; Vogt, 2007). Qualitative research provides essential information about the why's and how's underlying human-forest interactions by exploring diverse stakeholder perceptions and values, as well as peoples' lived experiences of multiple forms of forest use and governance.

This diversity of expertise in forestry research raises important, but, as yet, unaddressed, questions about the extent to which adoption of qualitative methodological approaches has followed suit, specifically with respect to exposing and communicating different forms of qualitative method use. Attempts have been made to characterize qualitative research in forest contexts. These studies have reflected on qualitative field work (Mitchell, 2004), discussed approaches to designing qualitative inquiries (Bliss and Martin, 1989; Ming'ate, 2014; O'Brien, 2003) or reviewed specific qualitative methods (Leipold, 2014; Stanislavaitis et al., 2015; Winkel, 2012). However, there is very little in the way of consideration of qualitative data collection, specifically documents — extant texts that exist prior to research (Coffey, 2014). A considerable part of human-forest interactions is articulated in documented form (Field and Burch, 2013). However, the use of documents in qualitative inquiry is rarely considered, compared to the attention paid to other forms of qualitative data collection, such as interviews (Elmendorf and Luloff, 2001; Field and Burch, 2013).

Researchers interested in qualitative, forestry-related research have a seemingly endless repertoire of texts available to draw from, including, but not limited to early-day treaties and forest management

* Corresponding author.

E-mail address: meike.siegner@alumni.ubc.ca (M. Siegner).

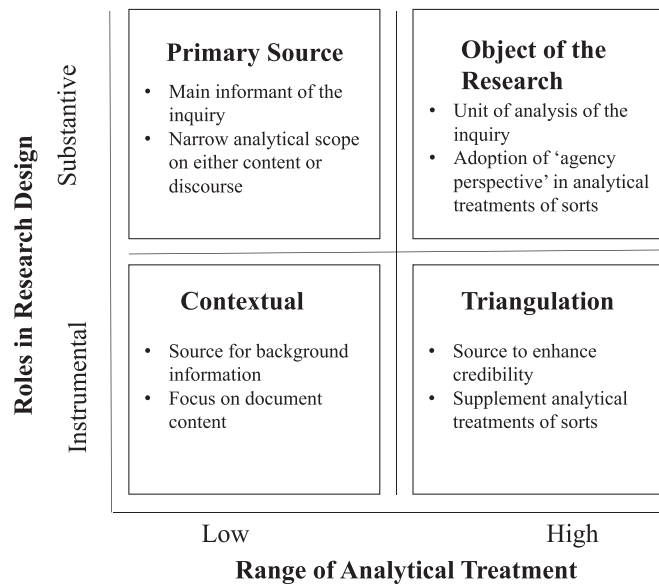


Fig. 1. Approaches to the study of documents in social research.

agreements, modern laws and policies that govern the world's forests, an almost innumerable number of forms, files and records that structure the daily work of forest practitioners, conservationists, regulators and business owners and written accounts documenting interactions of local communities with forests in different contexts. The aim of this article is to deepen our understanding of methodological practices associated with the study of documents in social research on forests from varying disciplines (e.g., anthropology, environmental history, human geography, sociology) concerned with the society-forest interface across different scales and contexts (Vogt, 2007). The specific objectives are to examine and analyse how researchers (1) make use of and (2) report on the study of documents in qualitative inquiry.

2. A typology for the use of documents in social research

The use of documents in social research is varied (Coffey, 2014). Here, drawing from the methodological literature we develop a typology of different approaches to the study of documents in social research. The typology describes four broad approaches: contextual; triangulation; primary source; and object of the research (Fig. 1). Each approach has a different focus on the roles of documents in the research design, and range of their analytical treatment. The contextual approach (lower left quadrant) captures research in which documents have the function to provide relevant background on the study of a chosen problem (Bowen, 2009). They are sourced, for instance, to determine scale and scope of a qualitative study, to identify study objects and sites, or to develop initial versions of research instruments (e.g., observation protocols, interview guides). Analytical treatment of documents typically remains limited to studying their content (Bowen, 2009).

In the triangulation approach (lower right quadrant), documents are sourced to contribute to generation of rich, thick description (Geertz, 1973), a central principle in ethnographic field work (Schensul et al., 1999) and qualitative research, in general (Creswell, 2013; Denzin and Lincoln, 2011).

Documents here have the function to enhance the credibility of a study (Fusch and Ness, 2015; Patton, 2002), for example, through provision of supplementary data, verification of information or identification of additional research subjects and themes (Bowen, 2009). Analytically, documents may be treated in a variety of ways, depending on the focus of the study. In many cases, documents are sourced and coded for content, that is, as repositories of descriptions, images,

numbers or accounts that provide further evidence for the information gathered in the field (Bowen, 2009). However, documents might also be scrutinized for linguistic attributes to supplement insights obtained through discourse-analytical techniques (Smart, 2012; Van Dijk, 1993). Both lower quadrant approaches can be classified as instrumental approaches to the study of documents, where the main focus of documents is to bring additional information to the inquiry, rather than driving it.

The two upper quadrants capture more substantive approaches, in which documents play a central role in inquiry. In the primary source approach (upper left quadrant), documents present the main source of data, for example, to study the whole body of textual recordings that shape routines and practices of specific organizational, institutional or event-related settings (Atkinson and Coffey, 2010). Or, in studies that examine official policies (Yanow, 2007). According to Bardach and Patashnik (2015), much of the likely data in policy analysis falls under the realm of written documents, such as policy texts, negotiation papers or public statements. In the primary source approach, documents are also used to study the mass media for public opinions on, or representation of, a variety of societal issues (Altheide and Schneider, 2013). In the specific case of historical analyses, documents may be the only viable source for the study of events that date back far into the past (Bailey, 1994; Scott, 1990).

Analytical treatment of documents in the primary source approach is more narrow, in that analysis largely falls in one of the two following categories: study of content, or discursive approaches of sorts. In content analytic techniques (Schreier, 2014), focus is on textual attributes in an attempt to screen, count and code content. That is, documents serve as repository of evidence in support of the research question. Discursive approaches (Fairclough, 1995; Fischer and Gottweis, 2012; Hajer and Wagenaar, 2003), instead, pay attention to language attributes of documents in an attempt to describe and interpret various meanings, ideas and social realities reflected in text. Greater attention is then paid to intertextuality (Allen, 2011) — the idea that the meaning of a text can only be understood in relation to other texts. Findings obtained from the study of documents in the principal source approach may be supplemented with other qualitative data (e.g. interviews or observations) (Macdonald, 2001), while the textual sources remain at the center of the inquiry.

Lastly, in the object of the research approach (upper right quadrant) an entire qualitative inquiry may be framed around the attempt to create in-depth understanding of the role and function of a specific document (or set of documents) in its social context of use (e.g. patient pedigrees, coroner records, legal case files) (Coffey, 2014; Prior, 2005). Documents may, thus, be treated analytically as entities that exist on their own and can influence episodes of social interaction (Latour and Woolgar, 1986). Indeed, from such an “agency perspective” (Prior, 2008:823), written texts become “facts” that can offer “proof” of things, “seal” negotiation deals, “be manipulated” by others, and so on. The object of the research approach can thus involve the analysis of extant texts, but also a range of other qualitative data (e.g. interviews, focus groups, observations).

3. Methods

Our study is based on a systematic literature review. Systematic reviews follow explicit methodological steps for document selection and analysis of the literature (Counsell, 1997; Moher et al., 2009). Systematic reviews have become prominent in social research (Petticrew and Roberts, 2008) and, in that vein, are increasingly being carried out to critically appraise qualitative research in various fields (Murphy et al., 1998; Nielsen and D'Haen, 2014; Sambunjak et al., 2010).

While most of these studies tend to focus on qualitative research in general, systematic reviews of specific qualitative data collection methods are rare, despite their great potential for knowledge synthesis and method refinement (Tong et al., 2016). With the main focus being

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