An inquiry into inquiry: Learning to become a literacy researcher

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ABSTRACT: This narrative chronicles my journey as a doctoral student in English Education as I navigated the decision as to which research methodologies I should align myself with during my doctoral studies. Gee's theory of discourses (2012) provides a framework in which to situate the identity work at play in deciding the kind of research methods one should undertake. This decision reflects not only the kind of work one will engage in, but also ways of doing, being, valuing and believing (Gee, 2012). What are broadly considered to be quantitative research methods can be considered a dominant discourse in educational research since these are the types of studies that receive federal funding and most influence policy and reform. Yet there is a subculture within my own department in which qualitative research is the dominant discourse. These two dominant discourses became a source of tension for me as I developed my own scholarly identity. I explore how participating in a research apprenticeship during my first year helped to mediate the tensions between these competing discourses. During this research apprenticeship, I also investigated my own learning of the research process. Engaging in this kind of autoethnographic study (Ellis, 2004) helped me to bridge the seemingly insurmountable divide between quantitative and qualitative research. Rather than viewing various research methodologies as diametrically opposed, I came to see them as different discourses that could, perhaps, be inhabited equally well. This meta-knowledge of discourses (Gee, 2012) provided me with a better understanding of the ways in which all methodologies are inherently ideological and thus privilege and marginalise certain ways of knowing. Finally, I suggest that viewing research methods as discourses and encouraging doctoral students to participate in research apprenticeships early on while also investigating their own learning processes' may help them adapt more easily to the kinds of dispositions and ways of thinking valued in scholarly research. Becoming fluent in multiple discourses might also enable doctoral students to become "border crossers" (Ball & Lampert, 1999), who translate and make connections between the different realms of quantitative and qualitative research methods.

KEYWORDS: Autoethnography, identity, education research, research apprenticeship, literacy.

AN INQUIRY INTO INQUIRY:
LEARNING TO BECOME A LITERACY RESEARCHER

> We have incredibly powerful tools that are being used in educational research. Unfortunately, the people doing the research are asking the wrong questions. (Lee, 2011)

> In quantitative research, the elegance of the design becomes more important than human suffering. (Macedo, 2011)

> How good could this conference really be? I mean, they accepted your quantitative shit. (Anonymous, personal communication, 2011)

During my first semester as a doctoral student in the department of Language and Literacy at a large, research university in the South-Eastern United States, I quickly realised that I was expected to be able to state with conviction whether I was a "qualitative" person or a "quantitative" person. The assumption was that I would choose qualitative research methods since my department privileges these methods; my advisor was a qualitative researcher, all of the scholars I knew in my field of English Education were qualitative researchers, and the "star" students in my department were qualitative researchers. It thus became important for me to identify myself as a qualitative researcher.

Finding my identity didn't come easily but rather followed a twisting path (Vygotsky, 1987, p. 156). It involved a gradual process that was modified as I gained new experiences and applied what I had learned to new settings. The three quotes I began this narrative with were taken from specific moments along my path that illustrate the tensions I felt about which research methodologies to pursue. These moments are what Fairclough (2003) call "cruces", because they represent tensions, ruptures or turning points along my path of deciding what kind of researcher I wanted to become. Ultimately, rather than viewing various research methodologies as diametrically opposed, I came to see them as different discourses that could, perhaps, be inhabited equally well. This meta-knowledge of discourses (Gee, 2012) provided me with a better understanding of the ways in which all methodologies are inherently ideological and thus privilege and marginalise certain ways of knowing.

THE FIRST SEMESTER

One of the first courses I took during my first semester in the doctoral program in English Education was a qualitative research course taught by an established scholar in qualitative research. My classmates came from a variety of educational fields including educational policy, mathematics education, art education, as well as a few from my own literacy department. Though we all fill one large building, and occupy major parts of two others, the various disciplines within our College of Education agreed on very little when it came to research methods, epistemologies and even world views.

In conversations during class breaks, I learned that most of my classmates were only taking this qualitative course because it was required of them; they didn't see the value in engaging in qualitative research and didn't even consider it to be valid research. I thought that perhaps they were just saying that they weren't interested in qualitative methods, but their actions confirmed their lack of interest; most of them spent class time updating their Facebook status, or working on assignments for other classes. On the other hand, most of the students from my own department held a similar contempt for quantitative courses. They saw quantitative methods or "positivist research" as far less valuable, and far less sophisticated than qualitative research.

My experience in this course introduced me to the perspective of viewing qualitative and quantitative research methods as binaries. These research methodologies were positioned as two world-views and we had to decide if we were one or the other. My professors in this and other courses encouraged us to think about how we viewed the world or "who you really are". The kind of identity work was evident here. My seemingly easy choice – statistical methods or qualitative methods – became more complicated as I was exposed to varying perspectives.

Donaldo Macedo's quote, "In quantitative research, the elegance of the design becomes more important than human suffering" represents how I viewed quantitative research during my first semester. I was being indoctrinated to see qualitative research as the answer to our educational problems. While I saw the complexities and depth that qualitative research methods afforded researchers, I knew, just from my semester of interactions with students from other departments, that they were not particularly interested in reading or learning about qualitative research methods. And I knew that these doctoral students, especially those in policy, would be likely to help shape educational policy in the future. I began to wonder about the impact that qualitative research could have, when qualitative researchers seemed to be "preaching" to the converted. In other words, the insights they had seemed to be read by those who already shared the same world-views. It seemed that a greater number of people paid attention to quantitative studies.

I became even more conflicted when I learned that quantitative research methods are the only type of studies that receive federal funding from the US government and most influence policy and reform. I felt very conflicted here. On the one hand, I wanted to do the kind of work that I believe captures the complexity and depth that qualitative work can get at. On the other hand, I wanted my work to be read by a broad audience and to have implications at the policy level.

Many of the conversations I had with my classmates during that course raised some concerns about how we might work together. They rolled their eyes at the feminist performance piece, while people in the art and literacy departments (myself included) congratulated ourselves on our intellectual superiority. Here were people sitting across the aisle from me who planned on becoming principals, policy leaders and professors. The only commonality we seemed to share was that we were all struggling to learn how to succeed as doctoral students. One of classmates in the qualitative course, Shanika (all names are pseudonyms) was a second-year doctoral student who planned to open up her own school. One day she told me:

> I wished they had a research for dummies course. I would totally take that. One thing that bugs me about the education courses is that they talk and talk about theory and how to do things, but they don't show you had to do it. There isn't any hands-on stuff....I wish in this class that we would have been working on a research project the whole time, not just the last week.

Shanika's experience was not an isolated one. Many of my peers expressed similar frustrations. But my own experience learning to become a researcher was very different from the experiences of my peers.

RESEARCH APPRENTICESHIP AS MEDIATOR

As a first year doctoral student, I participated in a research apprenticeship with a faculty mentor who has been awarded for his contributions to both research and mentoring doctoral students. My advisor managed to weave his own research into his mentoring of graduate students through the design of his research apprenticeships. My research apprenticeship helped to mediate many of the tensions between the competing discourses of qualitative and quantitative research methods.

Most of the reason my advisor has had such a successful track record of mentoring students into the academic profession is because of his deep belief in Vygotsky's sociocultural theory of development. His own research into how people develop seems to have provided him with unique insight into the kinds of processes and experiences doctoral students need to be successfully apprenticed into the profession. Though I had years of teaching experience, I came to graduate school without much of an idea of how research was conducted, written or analysed. But engaging in my research apprenticeship with my advisor over the two years demystified the research process for me.

The research study my mentor and I worked on was a multi-year study of concept-development among pre-service teachers in his service learning class. Initially, I assumed that all doctoral students at my institutions had similar kinds of research experiences. But in talking to other students (both in and outside my department), I discovered that the amount of time, guidance and support my advisor gave to me was rare.

DESIGNING MY OWN QUANTITATIVE STUDY

Part of the research apprenticeship was also dedicated to helping me begin to design my own research. After all the conversations I'd had with students about their lack of research experiences, I decided to pursue this question further. I took my idea back to my advisor, and together we discussed the ways I might design a study. I was interested in why students within one COE were having such vastly different mentoring and advising experiences. Could I interview a few people? Conduct a few case studies? My advisor suggested that I conduct a survey. A survey? Wait a minute. I was a qualitative researcher, thank you very much. However, after talking with my advisor for quite a while, I realised that a survey might be the best way to capture a snapshot of what was going in on with the 800 doctoral students enrolled in our College of Education. Still, I didn't love the idea of creating something as simple and basic as survey. What "rich, thick description" would a survey get me? More importantly, how would I be perceived by others?

CROSSING BUILDINGS/CROSSING BORDERS

Designing and conducting my own study provided me with the opportunity to have in-depth conversations with professors from a variety of fields. Designing a survey that was "reliable", and "valid", was much more difficult than I had anticipated. Because my advisor did not use surveys in his own research, he encouraged me to

meet with a survey expert housed in another department. This department was housed in another building several miles from my own department. Crossing over into another building felt like crossing over into another world. The professor who was the survey expert asked questions I had never thought to ask. He pushed me to rethink the design, order and wording of my questions, and forced me to think long and hard about what it was, exactly, that I wanted to know.

The Associate Dean of our COE also became interested in my study and officially "sponsored" my project. The Associate Dean helped me to get buy-in from the various departments housed in the COE by arranging for a survey critique session with professors from each department. Sitting around a table with professors from both qualitative and quantitative backgrounds providing pointed critiques was pretty intimidating. But all of the professors offered thoughtful feedback, even the quantitative researchers. They did not seem to be, as Donaldo Macedo suggested, ignorant of human suffering. They were very thoughtful in providing me feedback, asking about my intentions, and so on.

Meeting with survey experts and learning about survey design and analysis helped me realise how incredibly complex the tools that quantitative researchers use are; I saw that they require a great deal of thought and planning. Seeing my own study from both a qualitative and quantitative perspective helped me to develop a better understanding of the limitations and affordances of each of these methods.

Conducting this study also helped me see the benefit in working across disciplines and connecting and building upon similar ideas. My understanding here is best illustrated by a talk I attended by Professor Carol Lee entitled "Continually re-thinking the mentoring of doctoral students as future scholars". Professor Lee encouraged doctoral students to "move out of their silos" and take a more ecological approach to research. At one point, she said, "We have incredibly powerful tools that are being used in educational research. Unfortunately, the people doing the research are asking the wrong questions." Here was a professor publicly acknowledging that quantitative research might be a promising avenue for an English teacher to pursue.

I wondered how I might move out of my silo. As I began to review the literature on doctoral students and research apprenticeships, one book, in particular, Lagemann and Shulman's *Issues in Education Research* (1999) was extremely useful in my research. Ball and Lampert's chapter helped me understand that "different groups of people know and seek to make claims about teaching. They come from different communities with different norms for what counts as knowing and for expressing and giving evidence for knowledge claims" (p. 392). They write that they have seen that these various perspectives from different realms do not even "talk" to each other. "It usually takes translations, and people who are border crossers, to lend authority and comprehensibility to these perspectives – to inhabit the different realms of policymakers, researchers and classrooms. (p. 395). Reading about border-crossers helped me to view the divide between quantitative and qualitative methods and between departments in our COE in a whole new way.

DEVELOPING META-KNOWLEDGE

Engaging in a research apprenticeship with my advisor and conducting my own study began to help me develop a meta-knowledge of qualitative and quantitative methods. The process also enabled me reflect upon the ways that educational doctoral students are often positioned by others in specific disciplinary fields.

For example, I learned that many scholars have written about the unique challenges that doctoral students in education, in particular, face. These challenges include: 1) a perceived lack of rigour in their field (Young, 2008); 2) conflicting worldviews between teachers and researchers (Labaree, 2003); and 3) uneven opportunities for apprenticeship into a research culture (Shulman et al., 2006; Young, 2008). In spite of these challenges, many scholars believe that improving doctoral programs that prepare new educational researchers can do much to establish the relevance of the field of education broadly and the need for schools of education, in particular (Heath, 1999; Young, 2001a).

I also learned about the reasons why many scholars think that doctoral students in education have difficulty in entering into a research culture. For Richardson (2006), although students in educational doctoral programs bring with them years of classroom teaching experience, these same experiences often lead to misconceptions about the purpose and worth of research. For Labaree (2003), education doctoral students' skepticism of research actually stems from a worldview that is focused on the practical and experiential. The researcher's worldview, however, is focused on the analytic and theoretical. The differences in these two worldviews are one of the major obstacles in teachers becoming effective researchers:

> This clash plays out in part as a problem of how to accommodate potentially conflicting professional worldviews between teacher and researcher to the satisfaction of both, and in part as a problem of how to agree on the kind of educational experience that is needed for teachers to become effective researchers without abandoning teacherly values and skills. (p. 15)

Richardson (2006) also argues that it is critical that doctoral students be given ample opportunities throughout their program "to explore their beliefs and reflect on alternative conceptions to their sense of both educational scholarship and educational systems" (Richardson, 2006, p. 258). Through conducting my research study on research apprenticeships, I was given this ample time to explore my own beliefs and to reflect on "alternative conceptions" of educational research.

Part of my twisting path involved thinking about how doctoral students are apprenticed into different research cultures. As I read the literature about doctoral students in education, I thought about how beneficial it might be for all doctoral students to read these studies. The kind of identity work in becoming a scholar, as the literature points out, is complicated and often painful. But, it doesn't seem that doctoral students are encouraged to read about the scholarly work that has been conducted in this area. Reading about this, I imagine would help them begin to develop a meta-knowledge of discourse.

THEORY OF DISCOURSES

One of the most useful courses I took in my second year of my doctoral program was "New Literacy Studies." In this course, I learned about Gee's theory of discourses (2012). According to Gee, Discourses (with a capital "D") are "saying (writing)-doing-being-valuing-believing combinations" or "ways of being in the world" that integrate words, attitudes, identities, gestures, clothing, and so on (as quoted in Lankshear & Knobel, 2011, p. 107). Discourses are always linked to "the distribution of social power and hierarchical structures in society (Gee, as quoted in Lankshear & Knobel, 2011, p. 108). Having control over the literacies of the dominant discourses can result in greater acquisition of money, power and status. It is through participation in discourses that people become to identify with groups (Lankshear & Knobel, 2011, p. 107).

Here, I began to think of the ways that quantitative research methods can be considered a dominant discourse in educational research, since these are the types of studies that receive federal funding and most influence policy and reform. Having control over this dominant discourse can also result in a greater acquisition of power, and status. For example, the anonymous researcher I quoted at the beginning of my narrative, who jokingly referred to my study as "quantitative shit", had conducted a qualitative interview study that was theoretically informed, full of "thick, rich description" and well written. But she told me that she knew that no one would ever read her study; it was too long and too complex. And while I acknowledge the limitations of quantitative studies, they often are much more accessible to a wider audience. I was surprised by how many people expressed interest in my own quantitative survey study. As I mentioned earlier, the Associate Dean of Research in my College expressed great interest in my study. After I completed my study, it was presented by the Associate Dean at a College-wide faculty meeting. In other words, my "quantitative shit" received much more attention than some of my peers' qualitative studies.

While there are many types of discourses and many ways of being literate, Gee (2012) defines being literate as "having control of secondary language uses" (p. 173). Being literate, then, is a matter of using the "right" language in the "right" ways within particular settings (Lankshear & Knobel, 2011, p. 108). For Gee powerful literacy occurs when we use literacy as a "meta-language" to critique other discourses and literacies and the way "they constitute us as persons and situate us in society" (Lankshear & Knobel, 2011, p. 107). A powerful literacy involves meta-level knowledge that includes "knowing about the nature of that practice, its constitutive values and beliefs, its meaning and significance, how it relates to other practices, what it is about successful performance that makes it successful, and so on" (p. 113).

Developing a meta-knowledge of research methods as discourses helped me understand the nature of that practice, and how it relates to other practices. Thus, I can recognise and agree with Lather (2006), who stated, "Profoundly interventionist in the history of the welfare state, statistics has served as a political tool in the theatre of persuasion in a way that maps onto the recognised needs of policymakers" (p. 49); but that doesn't mean that I have to reject the dominant discourse entirely. In fact, if powerful literacy involves a "meta-language" to critique other discourses and literacies and the way "they constitute us as persons and situate us in society," then I

can both critique the dominant discourse, but also recognise that there are times when I may want to use this discourse.

Gee defines being literate as having control of secondary language uses. In terms of becoming a competent literacy scholar, then, I need to have control of language in multiple research methodologies. Instead of turning my back on quantitative methods completely, I need to learn how to use the "right" language in the "right" ways within particular settings (Lankshear & Knobel, 2011, p. 108).

SELF-STUDY AND META-KNOWLEDGE

Many doctoral students in my program read Gee, but they don't necessarily apply his theory of discourses to research methods. In the next section, I chronicle the importance of self-study in developing a meta-knowledge of research methods.

For the final project for my New Literacies Studies course, I created a "visual autoethnography" which was a systematic study of my own learning processes. The purpose of the final project was to document how I developed a better understanding of the concept of new literacies. In this visual autoethnography, I used Vygotsky's notion of the twisting path of concept development to show how my academic knowledge coupled with my everyday experience afforded me the opportunity to develop a rich concept of new literacies.

I initially resisted the idea of researching my own learning process because I felt it was self-indulgent, and I questioned the value it might have for others. However, my New Literacies Studies course professor encouraged me to think about the process of self-study as a particular methodology, and during my literature review on research apprenticeships, I read several articles that argued that self-study was important in gaining insights into how people learn. Kew, Given and Brass (2011), for example, write that self-study might help teachers "begin to develop notions of language and literacy as social practices, demystify educational research, and bridge perceived 'theory' and 'practice' divides in teacher education" (p. 2). And Neumann, Pallas and Peterson (2008), suggest that what is needed in research on doctoral students

> is far deeper pursuit of how and what doctoral students learn about research. Getting a grip on such questions will, we believe, likely strengthen efforts to build programs that strive to produce education researchers oriented to lifelong learning. It is very hard to organise a program to advance the learning of research if we do not know what such learning means, what it looks like, and what it requires. (p. 1499)

With these recommendations in mind, I began to systematically examine what my learning looked like.

PROCESS OF SELF-STUDY

One of my professors encouraged me to begin keeping a "learning journal" during the first semester of my doctoral program. I had over 35 entries in my learning journal that spanned two years. These entries became important data for me as I began to study my learning journey. I also drew on 16 written assignments related to my

readings of Gee's *Social Linguistics and Literacies: Ideology in Discourses* (2012) and Lankshear and Knobel's *Literacies: Social, Cultural and Historical Perspectives* (2011).

Though all of these learning journals were typed and saved on my computer, I began to create sketches and brainstorm ideas in an actual notebook of how I might visually represent my learning. Physically flipping through the pages in my notebook helped me better understand the progression of my thinking. This physical memory of how I organized my thinking was harder to come by scrolling up and down in my electronic files. When I began the project I had no idea how I would visually represent my learning (Figure 1). In the upper left-hand column on this page I wrote, "I don't even know how I would represent it visually at this point." I drew on my knowledge of photography to begin to think about the ways I might visually represent my learning. I began to sketch possible shapes and then begin searching for images on sites like Flickr and Google images, for inspiration.
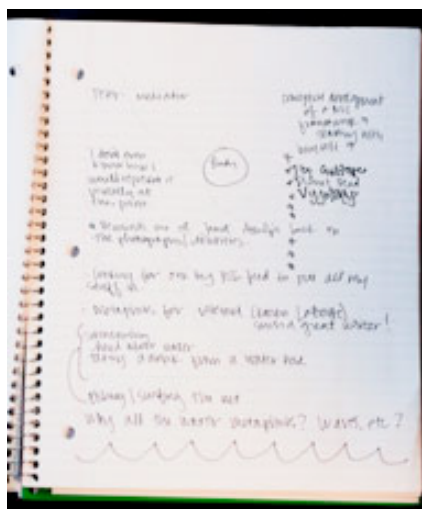

Figure 1.

Eventually, I settled on an initial concept: Vygotsky's twisted path of concept development. This decision was informed by the research project I was working on with my advisor, in which we studied the concept development of pre-service English teachers.

THEORETICAL CONSIDERATIONS FOR MY FINAL PROJECT

I began my visual autoethnography with the question, "What is literacy?" This was the question that I began to consider in more depth throughout this particular course. In order to better understand how I learned, I used Vygotsky's notion of the "twisting path" of concept development (1987, p. 156). I found an image of a DNA double helix to represent the twisting path (Figure 2). One strand represents my academic experiences and the other strand represents my everyday experiences. Vygotsky (1987) argues that it is the interplay, or the dialectical relationship, between formal knowledge and knowledge gained through everyday experience which enables people to think about problems beyond their range of experience (Smagorinsky, Cook & Johnson, 2003).

Gee writes that those in a sociocultural approach tend to completely ignore the psychological and individual cognitive aspects of learning (2009). He suggests that a "situated cognitive approach" is useful here. This situated cognitive approach includes definitions of verbal and situated learning, which closely mirror Vygotsky's notions of academic and everyday concepts (though he does not cite Vygotsky). According to Gee:

> There are two ways to understand words. I will call one way "verbal" and the other way "situated" (Gee 2004, 2007). A situated understanding of a concept or word implies the ability to use the word or understand the concept in ways that are customisable to different specific situations of use (Brown, Collins & Dugid 1989; Clark 1997; Gee 2004, 2007). A general or verbal understanding implies an ability to explicate one's understanding in terms of other words or general principles, but not necessarily an ability to apply this knowledge to actual situations. Thus, while verbal or general understandings may facilitate passing certain sorts of information-focused tests, they do not necessarily facilitate actual problem solving. (2009, p. 32)

While Vygotsky privileged the abstraction of academic concepts, Gee seems to privilege everyday concepts because of their situated quality. Vygotsky argued that academic concepts are learned through formal, systematic instruction such as classes at school. I could see fairly clearly how my understanding of the concept of literacy deepened as I worked my way through various courses such as Popular Culture, Globalism and Media, Vygotsky and, of course, New Literacies, as well as my research apprenticeship with my mentor.

Vygotsky privileged academic concepts because this kind of abstracted knowledge can be reapplied to new situations. Everyday concepts, on the other hand, are learned through social activity and social interaction. These everyday experiences tend to be situated in a specific context and so are not as easily reapplied to different settings. For everyday experiences, I included my experiences as a mother and photographer.

The distinctions between academic concepts and everyday experience are consistent with the distinctions between theory and practice. The formal principles of academic concepts create cultural schemata that enable a greater understanding of cultural practice (Smagorinsky et al., 2003). Because cultural practice can be described as "the ability to understand and act within networks of social relationships" (Smagorinsky et al., 2003, p. 1405) it can be also be seen as a kind of discourse (Gee, 2012). In this way, this interplay suggests a kind of Zone of Proximal Development because it allows the learner to go beyond what he or she could do alone.

Gee's theory of Discourses provides further nuances to Vygotsky's two-concept-strand theory. I find it helpful to think of academic knowledge as a specific type of discourse, and everyday experiences as types of discourses. Both Vygotsky and Gee argue that these two types of concepts or discourses are always working in relation to one another and can shape, reshape and transform one another.
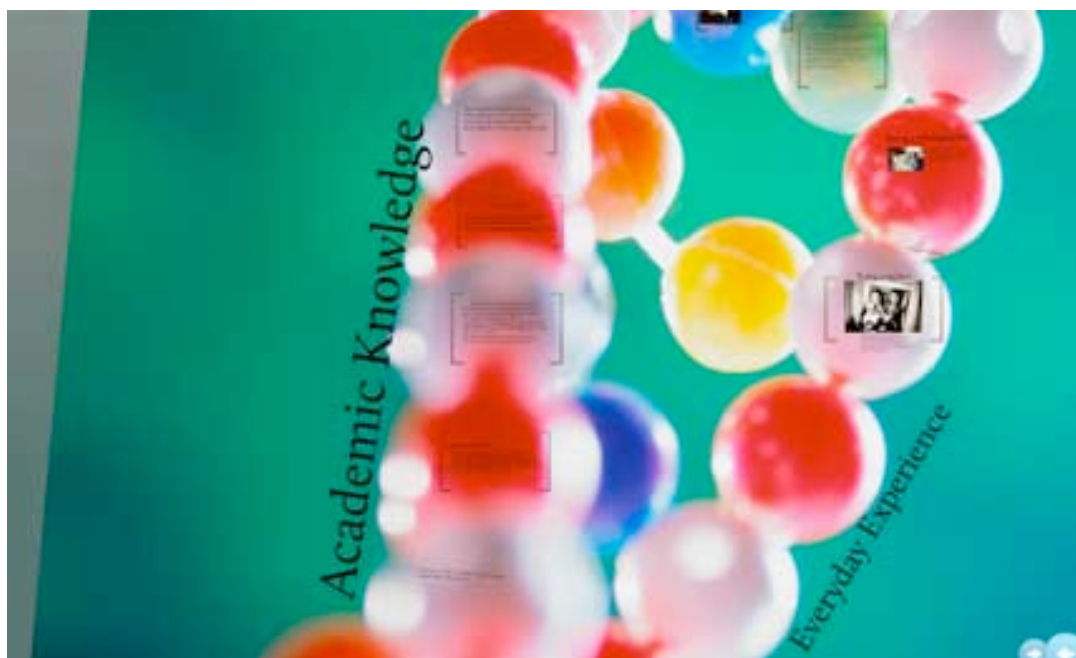
Figure 2.

BECOMING RESEARCH LITERATE

Creating my visual autoethnography for the NLS course greatly informed my understanding of what it meant to be a qualitative researcher. I felt that I was engaged in what Gee calls "deep learning" (2007, p. 171). Instead of learning about how to be a researcher, I was actively involved in "doing" and "becoming" a researcher. In fact, this process required that I be "willing and able to take on a new identity in the world, to see the world and act on it in new ways" (p. 172) as I made decisions about what to count as data and how to represent that data to others via new technologies such as Prezi and Screen-cast-o-matic. This deep learning has also helped me to think about the different ways of being a researcher. Having the opportunity to create what I thought was a well designed representation of my learning process gave me the confidence to incorporate aspects of design and aesthetics into my future research processes and products. The process of studying my own learning processes has also contributed to my identity development as a beginning researcher and helped me formulate more thoughtful research questions to pursue.

CONCLUSION

Looking back and reflecting on the twisting path my development as literacy researcher has taken continues to provide insights for me. While I began my journey trying to align myself with the kind of researcher I thought I was expected to "be", I now see research methods as different discourses that can, perhaps, be inhabited equally well. This meta-knowledge of discourses (Gee, 2012) has provided me with a better understanding of the ways in which all methodologies are inherently ideological and thus privilege and marginalise certain ways of knowing.

Viewing research methods as discourses and encouraging doctoral students to participate in research apprenticeships early on while also investigating their own learning processes may help them adapt more easily to the kinds of dispositions and ways of thinking valued in scholarly research. Becoming fluent in multiple discourses might also enable doctoral students to "move out of their silos" (Lee, 2011), and become "border crossers" (Ball & Lampert, 1999), who translate and make connections between the different realms of quantitative and qualitative research methods.

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