Use of the Transformative Framework in Mixed Methods Studies

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Abstract

A concern exists that mixed methods studies do not contain advocacy stances. Preliminary evidence suggests that this is not the case, but to address this issue in more depth the authors examined 13 mixed methods studies that contained an advocacy, transformative lens. Such a lens consisted of incorporating intent to advocate for an improvement in human interests and society through addressing issues of power and social relationships. Included for review were 10 criteria for a transformative study and rigorous procedures for mixed methods research. The findings of this study suggested that several transformative criteria are being used in published mixed methods studies but that some are underutilized. This analysis helped advance eight key elements that authors might use for incorporating a transformative lens into a mixed methods study.

Keywords

mixed methods, mix methods, multimethod, triangulation, transformative, emancipatory, advocacy, review

As researchers, we are concerned about the issues in our society today, such as poverty, disease, war, and rigid power imbalances. We are concerned that values are part of all research and that the goals of inquiry should be directed toward social justice and addressing the human condition in our society (Denzin & Lincoln, 2005). More specifically, this perspective includes the need to examine issues of power imbalances and the marginalization of underrepresented groups in our society. Social research needs to address these issues given the changing demographics of our society, the injustices that continue today, and the important role that researchers have to play in examining these issues (Mertens, 2003, 2009).

It is equally important that our social research methodologies be sensitive to communities that may be marginalized. Such sensitivity is especially found within qualitative research in which the politics of inquiry, the emphasis on values, and the goal of social justice hold center stage (Denzin & Lincoln, 2005). As new methodologies emerge in social research, embracing these ideals can help to shape a more equitable society in the United States and around the world. One new methodology that has become increasingly visible and used by social scientists is mixed methods research (Tashakkori & Teddlie, 2003). It is new in the sense that in the past 20 years writers have viewed it as a stand-alone research methodology shaped by distinct research designs for procedures, a nomenclature to describe it, and visual models to present the complexities of the designs (Creswell & Plano Clark, 2007). *Mixed methods research* can be defined as the collection, analysis, and integration of quantitative and qualitative data in a single study or in a program of inquiry (Creswell & Plano Clark, 2007). Its core characteristics include collecting both quantitative (closed-ended) and qualitative (open-ended) data, the rigorous and persuasive methods associated with both forms of data, and the integration of the two data sets through merging them or connecting them sequentially, with one building on or extending the other.

The Problem

It is alleged that too few published mixed methods studies contain the goal of social justice and a concern for the human condition. This was the concern voiced by Creswell and Plano Clark (2007) as they discussed the need for more advocacy research within the field of mixed methods. They reviewed a small number of mixed methods studies that included an advocacy stance (Bhopal, 2000; Ely, 1995; Watkins, 1998). In addition, Howe (2004) criticized mixed methods research for not being interpretive enough and

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honoring understanding people in their own terms, engaging stakeholders in dialogue, and encouraging a democratic role for participants. These ideas were then echoed by Denzin and Lincoln (2005) in their internationally acclaimed *Handbook*, as they announced that the mixed methods movement "takes qualitative methods out of their natural home, which is within the critical, interpretive framework" (p. 9). Thus, the concerns are not only the paucity of mixed methods studies that incorporate advocacy but also that the qualitative component in these studies is deficient in considering the needs of the marginalized that might lead to a redressing of critical social issues.

The response to this criticism by the mixed methods community has been somewhat muted and fragmented. Recent articles in the *Journal of Mixed Methods Research* have begun to incorporate an advocacy lens, such as the studies of women's social capital (Hodgkin, 2008) and African American women's interest in science (Buck, Cook, Quigley, Eastwood, & Lucas, 2009). From the field of sociology, recent writings on feminist research approaches have linked a feminist standpoint to mixed methods research (Leckenby & Hesse-Biber, 2007; Stewart & Cole, 2007). New mixed methods studies with an advocacy perspective are continually emerging in diverse journals, such as exploring rape myths (McMahon, 2007), fairness concerning housework and gender equality (Nordenmark & Nyman, 2003), and escape from intimate partner violence by rural women (Riddell, Ford-Gilboe, & Leipert, 2009). In a paper by the senior author of this article (Sweetman, 2008), a preliminary review of several literature data sets yielded 34 mixed method studies that utilized a transformative framework. In addition, the writings by Mertens (2003, 2009) articulated a clear connection between the *transformative framework* and mixed methods. In Mertens' writings, several mixed methods studies are cited as incorporating this framework. Moreover, Mertens has provided an original, insightful contribution to the mixed methods literature by bridging the philosophy of inquiry (i.e., paradigms) with the practice of research. In discussing this perspective, she said,

> Transformative . . . scholars recommend the adoption of an explicit goal for research to serve the ends of creating a more just and democratic society that permeates the entire research process, from the problem formulation to the drawing of conclusions and the use of results. (Mertens, 2003, p. 159)

Using the Transformative Framework

Indeed, Mertens (2003) has given us a framework that has immediate applicability for assessing the inclusion of an advocacy perspective in mixed methods studies. She begins by suggesting that the name for this framework is the transformative framework and that it includes a person's worldview and implicit value assumptions. These assumptions are that knowledge is not neutral and is influenced by human interests. Knowledge reflects the power and social relationships within society, and the purpose of knowledge construction is to aid people to improve society. Issues such as oppression and domination—found in critical theory perspectives—become important to study. She cites several groups that have extended the thinking about the place of values in research, including feminists, members of diverse ethnic/racial groups, and people with disabilities (Mertens, 2003). By 2009, Mertens expanded her list of marginalized groups to also include lesbian, gay, bisexual, transgender, and queer communities, and enlarged her theoretical perspectives to include positive psychology and resilience theory.

In both her 2003 and 2009 writings, Mertens linked her transformative framework to steps in the process of research. More specifically, she discussed relating stages in the research process—defining the problem[1] and searching the literature, identifying the research design, identifying data sources and selecting participants, identifying or constructing data-collection instruments and methods, and conducting analysis, interpretation, and reporting of results—to transformative ideas. In this way, Mertens provided stages of research in which transformative criteria might be found. She discussed several criteria of a transformative framework, and we added to her list based on our preliminary analysis of studies (see Creswell & Plano Clark, 2007; Sweetman, 2008). In specifying transformative criteria, Mertens was interested in how authors introduced the transformative view into a research study through the use of a research problem that had relevance to a marginalized community, a theoretical lens (such as feminist theory) that might guide the research, research questions that were relevant to the issues of the community, and a literature review that included key issues of the community, such as diversity and oppression. We include here the criteria that Mertens mentioned along with several criteria that we added. Framed as questions, the criteria are as follows:

(a) Do the authors openly reference a problem in a community of concern? (b) Do the authors openly declare a theoretical lens? (c) Were the research questions (or purposes) written with an advocacy stance? (a criterion we added), (d) Did the literature review include discussions of diversity and oppression? In addition, Mertens presented several useful suggestions for collecting data from marginalized groups: (e) Did the authors discuss appropriate labeling of the participants? (f) Did data collection and outcomes benefit the community? (g) Did the participants initiate the research, and/or were they actively engaged in the project? (another criterion we added). Finally, Mertens was also interested in the data analysis and how the results would be used to facilitate change, such as developing

Table 1. Search Terms Used to Locate Articles for This Review

Transformative terms	Mixed methods terms
Advocacy	Mixed method*
Advocate	Mix method*
Feminist	Mixed-method*
Feminism	Mix-method*
Critical theory	Multimethod*
Critical race theory	Multi-method*
Queer theory	Multi method*
Disability theory	Triangulation
Transformative emancipatory	Quantitative and qualitative

Note: * indicates a wildcard.

instruments, interventions, and providing information for policy makers. Thus, she asked, (h) did the results elucidate power relationships? (i) Did the results facilitate social change? We added a question that was implied in all of the above criteria: (j) Did the authors explicitly state their use of a transformative framework? We present these criteria in no particular order although it might be argued that some are more important than others. Because Mertens' criteria are well established in the literature, we took them at face value, recognizing that through our analysis we might reflect on their value and offer suggestions for a more complete list (see our discussion section later).

Finding Mixed Methods Studies

Our next step was to locate mixed methods studies that we could examine for these 10 criteria. Rather than select representative articles, we wanted to locate a small set of exemplary studies that we could analyze in depth. By exemplary, we mean those articles that most fully embody the elements of both the transformative framework as well as mixed method research design. Our first challenge was how to locate these studies. We conducted an extensive search of three online data bases, PsycArticles, PsycINFO, and Business Source Complete, building on the approach used by Sweetman (2008). We delimited the search to peer-reviewed articles, studies in English, and those that contained one or more of the 10 transformative criteria from Mertens (2003). Searching for mixed methods articles was a daunting task because of their diffuse publication in many fields and subject areas (Creswell & Plano Clark, 2007). In addition, coming up with adequate search terms was also a challenge. We used the search terms from Sweetman (2008) to identify transformative articles. His list, as shown in Table 1, casts a wide net for articles.[2] The overall search yielded 272 articles. After examining some of these articles, we were concerned about the quality of the mixed methods studies in this large pool of articles. Thus, we applied specific rigorous mixed methods criteria to select our articles. We used criteria of studies that included both quantitative and qualitative data and integrated the two strands of data (and we could locate the place in the article in which the two strands were integrated). We also noted the type of theoretical lens being used in the study. This reduced our pool of articles to 42.

After the articles were evaluated and screened for mixed methods, 42 articles remained and were examined to determine whether they had a transformative worldview according to the definition provided by Mertens (see earlier discussion). We also reviewed them in terms of whether they included one or more of the 10 criteria we were looking for in transformative articles. This process led to the selection of 8 articles from the 42, and we augmented the 8 with 5 others that we knew embraced a transformative perspective. Thus, we ended with 13 transformative–mixed methods studies for analysis.

We closely inspected these 13 articles and identified both mixed methods features as well as the 10 elements of the transformative framework. Using an intercoder agreement process (Creswell, 2007), we conducted a pilot coding exercise of one mixed methods article with the transformative framework that was not in our final pool (Riddell et al., 2009), and we agreed on a scoring system for assessing both mixed methods and transformative criteria. In ascertaining the use of the transformative framework, articles were evaluated with a simple yes/no as to whether they included each of the 10 criteria of the transformative framework described earlier in this article. Members of the research team independently examined a few articles in detail, and answers were compared to ensure agreement. With regard to the elements of mixed methods research design, a yes/no checklist was developed based on design considerations for mixed methods research offered by Creswell and Plano Clark (2007). The detailed review of these 13 articles was conducted by one member of our research team (Badiee) and reviewed and confirmed by the other two authors.

Results

Our analysis consisted of reviewing the mixed methods characteristics of the transformative articles (Table 2), a categorical assessment of each article in terms of the 10 transformative criteria (Table 3), and a discussion of specific examples illustrating ways in which authors incorporated each of the 10 criteria into their studies.

Mixed methods characteristics of the articles. As reflected in Table 2, a wide variety of journals published the mixed methods studies, with each of the 13 articles published in a different journal. There was also variety in theoretical lenses, with six different lenses being employed. Feminism was the most common (6 studies), with socioeconomic status as the next (2 studies). Some articles included advocacy that spanned across multiple social categorizations, such as Cartwright, Schow, and Herrera's (2006) study

Table 2. Mixed Methods Characteristics of the Transformative Articles

Authors	Journal	Theoretical lens	Participants	Qualitative data	Quantitative data	Form of integration	Location of mixing
Boland, Daly, & Staines, 2008	*Journal of Applied Research in Intellectual Disabilities*	Disability	People with disabilities and their advocates	Focus groups	Questionnaire & survey	Sequential	Results, discussion
Cartwright, Schow, & Herrera, 2006	*Women & Health*	Ethnic	Hispanic females in Southeast Idaho who have type 2 diabetes and are farmworkers, and their families	In-depth interviews	Body mass index & glucose level	Concurrent	Discussion
Ferree, 2003	*American Journal of Sociology*	Feminist	Abortion debate via newspaper analysis	Interviews, in-texts, organizational documents, legislative debates	Articles	Concurrent	Conclusion
Filipas & Ullman, 2001	*Social Reactions*	Feminist	Sexual assault survivors	Open-ended interviews	Questionnaire	Concurrent	Discussion
Freeman, 2000	*Families in Society*	Feminist	Practitioners of Satir growth model	Semistructured interview	Survey	Sequential	Discussion
Hill, Dillane, Bannister, & Scott, 2002	*Child and Family Social Work*	Socioeconomic status	Families facing eviction	Interviews & case record analysis	Questionnaire	Sequential	Conclusions
Hodgkin, 2008	*Journal of Mixed Methods Research*	Feminist	Adults in Stage 1;Women in Stage 2	In-depth interviews	Survey	Sequential	Discussion, conclusion
Hollingsworth, 2004	*Social Work Research*	Human ecology theory	Females in child custody battles	Semistructured interview	Structured interview	Sequential	Results, discussion
Kumar et al., 2000	*International Journal of Drug Policy*	At-risk health	Drug users	Unstructured interviews, semistructured interviews, focus groups, & observation	Structured reporting instrument	Sequential	Results
Newman & Wyly, 2006	*Urban Studies*	Socioeconomic status	People of low socioeconomic status placed in New York City	In-depth interviews	Survey	Sequential	Gentrification and low-income residents (in results area)
Nordenmark & Nyman, 2003	*European Journal of Women's Studies*	Gender	Couples with children	Open-ended interview	Questionnaire	Concurrent?	Results; Conclusion
Shapiro, Setterlund, & Cragg, 2003	*Affilia*	Feminist	Older women with incontinence	In-depth interviews & focus groups	Questionnaire	Sequential	Results, conclusion
Tolman & Szalacha, 1999	*Psychology of Women Quarterly*	Feminist	11th-grade girls from urban and suburban high schools	Semistructured interview	Quantitized interview data	Sequential	Data analysis, results, discussion

Table 3. Characteristics of Transformative Studies[a]

Authors	Type of transformative article	1	2	3	4	5	6	7	8	9	10
Boland, Daly, & Staines, 2008	Evaluation of a social advocacy program	Yes	No	No	No	Yes	No	Yes	No	Yes	Yes
Cartwright, Schow, & Herrera, 2006	Evaluation of a social advocacy program	Yes	No	No	Yes	No	Yes	Yes	No	Yes	No
Ferree, 2003	Power/critical	Yes	Yes	Yes	No	No	No	No	Yes	Yes	No
Filipas & Ullman, 2001	Giving voice to marginalized	Yes	No	No	No	No	Yes	No	No	Yes	No
Freeman, 2000	Power/critical	Yes	Yes	No	Yes	No	No	No	No	No	No
Hill, Dillane, Bannister, & Scott, 2002	Evaluation of a social advocacy program	No	No	No	No	No	No	No	No	Yes	No
Hodgkin, 2008	Power/critical	Yes	Yes	No	Yes	No	No	No	Yes	Yes	Yes
Hollingsworth, 2004	Power/critical	Yes	Yes	Yes	Yes	No	No	No	Yes	Yes	No
Kumar et al., 2000	Immediate benefit to community	Yes	No	Yes	No	No	Yes	Yes	Yes	Yes	No
Newman & Wyly, 2006	Giving voice to marginalized	Yes	No	Yes	No	No	No	No	Yes	Yes	No
Nordenmark & Nyman, 2003	Power/critical	Yes	Yes	Yes	Yes	No	No	No	Yes	No	No
Shapiro, Setterlund, & Cragg, 2003	Giving voice to marginalized	No	Yes	Yes	No	No	No	Yes	Yes	No	No
Tolman & Szalacha, 1999	Power/critical	No	Yes	No	Yes	No	No	No	Yes	No	No

a. Criteria adapted from Mertens, 2003.
1. Did the authors openly reference a problem in a community of concern?
2. Did the authors openly declare a theoretical lens?
3. Were the research questions written with an advocacy stance?
4. Did the literature review include discussions of diversity and oppression?
5. Did authors discuss appropriate labeling of the participants?
6. Did data collection and outcomes benefit the community?
7. Did the participants initiate the research, and/or were they actively engaged in the project?
8. Did the results elucidate power relationships?
9. Did the results facilitate social change?
10. Did the authors explicitly state use of a transformative framework?

advocating for poor Hispanic female immigrants. There were a wide range of participants in the studies examined. The most common demographic characteristic was that participants were female (5 studies), but even within this categorization, there was wide variety, including girls in high school (Tolman & Szalacha, 1999), older women with children (Hollingsworth, 2004), and older women (Shapiro, Setterlund, & Cragg, 2003). Additional populations of interest included people with disabilities (Boland, Daly, & Staines, 2008), families facing eviction (Hill, Dillane, Bannister, & Scott, 2002), psychotherapists who utilize the Satir growth model as a theoretical basis for their practice (Freeman, 2000), drug users (Kumar et al., 2000), those with low socioeconomic class (Newman & Wyly, 2006), and couples with children (Nordenmark & Nyman, 2003). The only study where the population of interest was not contacted directly was Ferree (2003), where analysis of the abortion debate was considered through newspaper analysis.

Regarding qualitative data collection, we found that interviews, and in particular semistructured interviews, were the most common methods. Focus groups were most often used in conjunction with other qualitative methods (e.g. Kumar et al., 2000; Shapiro et al., 2003), but 1 study used them as the only qualitative data-collection method (Boland et al., 2008). In these studies, the authors made explicit their reason for choice of focus groups—to enable participant ideas to build from one interviewee to another. Observation was the least common explicitly used qualitative data-collection method, found in only 1 study (Kumar et al., 2000). In terms of quantitative data collection, we found the majority (10 of 13 articles) used some type of survey instrument. Although these surveys were typically filled out by respondents, the study by Hollingsworth (2004) collected survey data using structured interviews. The most unique approach among quantitative data-collection techniques was that of Cartwright et al. (2006), who used physical measures of glucose and body mass index (BMI) in their study of Hispanic female farm workers with type 2 diabetes. Rather than collecting quantitative data, Tolman and Szalacha (1999) quantified interview data for the quantitative portion of their data. This practice has been termed a *gray*

area in mixed methods research, as it does not represent rigorous and independent quantitative data collection (Creswell & Plano Clark, 2007).

Besides collecting both quantitative and qualitative data, a characteristic of mixed methods research is the integration of the two databases. In the majority of studies (9 of 13), the authors used a sequential design in which one form of data collection (either quantitative or qualitative) helped inform the other form of data collection (either quantitative or qualitative). The form of integration in these studies consisted of connecting the results from the preliminary analysis to the data collection of the follow-up procedure. The remaining four studies used a concurrent design in which both quantitative and qualitative data were integrated through merging the databases concurrently to provide an overall understanding of the research problem. One aspect of integration is its location in a journal article. Mixing (or integration) could occur in multiple locations within an article, with roughly half of the articles mixing in only one section and the other half in two. Of the sections where mixing occurred, half the articles mixed when reporting data produced during the study (i.e., results section), half mixed when relating results to theory or to research questions (i.e., discussion section), and half mixed when relating those findings to practical implications or future research directions (i.e., conclusion section). Only 1 study (Tolman & Szalacha, 1999) mixed in the analysis section as well.

Transformative characteristics of the articles. As shown in Table 3, the results for the various transformative criteria were mixed. Some criteria were met more often than others, but some were barely addressed. Three or fewer articles declared the use of a transformative paradigm, mentioned labeling of participants, or indicated how data collection and outcomes would benefit the community under study. Most articles did not discuss how participants initiated the project or were considered coresearchers and did not include a discussion of diversity or oppression in their literature reviews. Roughly half of the articles met the criteria for indicating the use of a theoretical lens or formulating research questions written with an advocacy stance. Some criteria were fulfilled by most of the studies chosen for analysis. The majority of authors referenced a problem in a community of concern, mentioned how results would elucidate power dynamics, and discussed how results would facilitate social change.

Did the authors openly reference a problem in a community of concern? Of the 13 articles selected for analysis, 10 of them mentioned a problem that originated in a community of concern. Researchers mentioned a variety of problems. Cartwright et al. (2006) discussed the fact that Mexican immigrants were often underserved and that researchers often failed to contextualize their experiences. Ferree (2003) framed the problem in terms of how court decisions in Germany and the United States presented different views of feminism in these societies. Filipas and Ullman (2001) addressed negative reactions to sexual assault victims and how these reactions contributed to poorer psychological outcomes. Freeman (2000) highlighted family therapy's lack of attention to gender issues. Hodgkin (2008) addressed the exclusion of women in certain organizations and the disproportionately large number of women in unpaid domestic roles with limited status. Hollingsworth (2004) discussed individual problems of women with mental illness who had lost custody of their children, such as due to substance use, lack of parenting skills, and poor work history, as well as environmental issues such as less social support and homelessness. Kumar and colleagues (2000) described reasons why the health field in India did not respond effectively to the spread of HIV among intravenous drug users: difficulty in dealing with illegal drug use, perceptions of intravenous drug users, and a failure to recognize the importance of the epidemic. Newman and Wyly (2006) discussed the displacement of low-income individuals. Nordenmark and Nyman (2003) explained that the primary responsibility for housework and child care fell on women's shoulders. Boland et al. (2008) took a slightly different approach in discussing their problem. They explained that it was essential for people with disabilities to have an active role in the services they sought. These authors were in the process of identifying the problems faced by members of the disability community in their services, and their intent was to assess health behaviors and needs of this population.

This criterion seemed to contain two elements. First, the group under study had to be identified as a *community of concern*. The transformative framework is marked by the "conscious inclusion of a broad range of people who are generally excluded from mainstream society" (Mertens, 2003, p. 148). Thus, this label implies an underrepresented or marginalized group. Mertens (2003) listed dimensions of diversity that have been historically linked to discrimination, such as social class, disability, or gender. Referring back to Table 2, some of the selected articles included these aspects of diversity. Boland et al. (2008) studied people with disabilities, whereas Shapiro et al. (2003) addressed issues faced by older women. Newman and Wyly (2006) were concerned with the needs of people with low socioeconomic status.

A community was considered of concern if the authors made an argument for how its members were oppressed, marginalized, or underrepresented. Authors did this in various ways. By comparing the dominant paradigms in the United States and Germany, Ferree (2003) addressed the power of these paradigms in shaping thought. Nordenmark and Nyman (2003), Freeman (2000), and Hodgkin (2008) disclosed awareness of gender-based inequality in society. In their studies, they sought to understand how these inequities were reflected in society. For instance, Nordenmark

and Nyman (2003) stated, "Even though men have taken on more of the responsibility for household work, it has not been to the same degree as women's increased engagement in paid work" (p. 182). Kumar and colleagues (2000) and Hollingsworth (2004) discussed the environmental and individual stressors experienced by their prospective participant groups. Hollingsworth cited "less social support or services" and "homelessness" as examples of environmental conditions that made it difficult for women with severe mental illness who have experienced child custody loss (p. 200).

The second aspect of the question is that the research problem has to be referenced by members of the community. One interpretation of this was that the problem was more than research based; it is also based on community needs. In these articles, one way in which researchers accomplished this goal was by aligning themselves with community-based organizations. For instance, Cartwright et al. (2006) worked closely with the Hispanic Health Projects (HHP), a community-based organization dedicated to promoting social justice at individual and systemic levels. The research conducted through HHP served to raise awareness and generate dialogue about social issues pertinent to the community. However, some problems did not necessarily emerge directly from the community but from research. HHP research "identifies and explores health problems and raises consciousness of the issues within the community" (Cartwright et al., p. 91). Filipas and Ullman (2001) referenced the research problem that sexual assault survivors who received negative reactions from others fared worse psychologically than those who did not.

Did the authors openly declare a theoretical lens? Academicians have emphasized the use of a theoretical lens in transformative research (Mertens, 2003). In the present analysis, roughly half the articles ($n = 7$) discussed a theoretical lens. The remaining six articles did not explicitly state the use of a theory. The most common theory was a feminist framework ($n = 5$), and authors also mentioned human ecology theory ($n = 1$) and gender theory ($n = 1$).

Of those authors who used a theory, all established their prospective theoretical lenses in their introductions, but they varied in the way they were presented. Two articles focused specifically on how concepts of the theoretical lenses were manifested in society. Ferree (2003) discussed social movements within the United States and Germany related to abortion rights. She stated that what is considered feminism in one culture is marginalized in the other, and she intended to show how institutional discourse of each country framed two different understandings of women's rights. Thus, Ferree presented feminism as a culturally based concept and used her article to explore its understanding in the contexts of the two countries. Nordenmark and Nyman (2003) incorporated gender theory into their article. Their entire introduction was focused on gender, and they described what constituted a gender-equal society and followed it with a discussion of how Sweden does not meet the criteria to be considered egalitarian in terms of gender. They emphasized the importance of gender ideology in framing perceptions of fairness.

Two articles described their theoretical lenses in a separate section in the introduction. Freeman (2000) discussed the evolution of feminist-informed practices in family therapy and presented feminism using Satir's growth model. She also included a conceptual framework section that outlined eight components that could be considered feminist informed based on the literature. Thus, Freeman (2000) presented feminism in a separate section and used the family therapy literature as a framework. Hollingsworth (2004) also presented human ecology theory in a separate section entitled "theoretical framework and research design" and defined the theory as the idea of "humans as biological organisms and social beings, in interaction with their environment" (p. 200). This author advanced the theory based on the literature and then narrowed it for the purposes of the study.

Although their approaches varied somewhat, three authors concentrated on feminist research rather than feminism as a concept, especially in the context of mixed methods. Hodgkin (2008) presented feminism when discussing the aim of her article, which was to "demonstrate the use of mixed methods in feminist research" (p. 297). She explored women's social capital in relation to gender and connected her research aims to methodology. She subsequently clarified what is considered feminist research and built a case for mixed methods research by explaining how it addressed the weaknesses inherent in using solely a quantitative or qualitative approach: "Within this [transformative] paradigm, mixed methods are preferred to highlight issues of need (quantitative data) and to give voice to these issues (qualitative data)" (Hodgkin, 2008, p. 300). She highlighted the power of mixed methods approaches and stated,

> Capturing women's social capital, and the complexities associated with this, led the researcher to want to examine it from different angles (Darlington & Scott, 2002). Thus, both quantitative and qualitative methods of data collection were used. (Hodgkin, 2008, p. 300)

Shapiro et al. (2003) also addressed mixed methods within feminist research. They began by clarifying the purpose of feminist research. They subsequently built a case for mixed methods approaches within feminist articles and even provided examples of how to do so. Thus, these authors intended to make a contribution to the feminist body of literature by encouraging mixed methods. Tolman and Szalacha (1999) initially discussed how

feminist scholars have addressed their topic of girls' sexuality, and they used arguments by these scholars to identify deficiencies in the literature. Like Freeman (2000) and Hodgkin (2008), they presented arguments for the use of mixed methods within feminist research.

In addition to mentioning the lens in the introduction, authors varied in the way they incorporated theory into their projects. In five of the seven articles, they discussed their theories at every stage of the research process. Some authors, such as Ferree (2003), made studying the theory (i.e., feminism) a central component of the design. The introduction was focused on social movement discourses, especially feminism. Shapiro et al. (2003) discussed their use of feminist theory in the introduction and in the conclusion:

> Feminist research is a process through which women can give voice to and act on sensitive and complex areas of life. It aims to facilitate, in an empowering manner, women sharing their experiences, having input into the research process, and producing more equitable policy outcomes for broader groups of women. (p. 32)

In the remaining six articles, some authors briefly mentioned a theoretical perspective but did not elaborate enough for it to be considered a broad explanatory theory. Cartwright et al. (2006) were one example. The authors discussed human rights but did not elaborate on how that perspective fits into their study.

Ferree (2003) provided a rich, detailed description of the interaction between power relations, framing language, discourses, and radical identities, such as feminism. Her data collection and analysis focused on the issue of feminist framing, and the conclusion included a discussion of how her project made a contribution to feminist understanding. Freeman (2000) wrote about feminism within the context of family therapy:

> Feminist-informed critiques of family therapy call for a recognition of the reality of a gendered world, for an understanding of how gender serves as a major organizing construct in the lives of individuals and families, and for the application of this recognition and understanding to the design and implementation of gender-sensitive therapeutic interventions. (p. 256)

The central purpose of Nordenmark and Nyman's (2003) project was to explore perceptions of fairness regarding household chores and gender inequality. Their article was different from the others in that they discussed a variety of theories related to gender, rather than just feminism. For instance, they highlighted the importance of "gender ideology" in forming perceptions of gender equality (Nordenmark & Nyman, 2003, p. 184). Their data focused on perceptions of gender inequality, and they connected their results to gender theories in the discussion.

Were the research questions (or purposes) written with an advocacy stance? Traditionally, a large number of studies in the human and social sciences have attempted to take a nonbiased, neutral approach. Transformative research is different because it aims to address power imbalances in society and is not value free. In fact, transformative researchers should disclose an advocacy approach, indicating how they purport to help improve these power imbalances in their purpose statements or research questions. Advocacy is considered taking a stand against a perceived injustice, such as patriarchy. A total of 6 of the 13 studies undertook an advocacy stance.

In some studies, advocacy was clearly reflected in the purpose statements. Ferree's (2003) study can be perceived as taking a strong advocacy stance:

> The main argument of this article is that institutionalized forms of discourse offer opportunities to speakers but do not force the choice of the most resonant framing; the gradient of opportunity still allows actors to opt for radicalism rather than resonance. (p. 305)

Ferree used language that implied power imbalances, such as *institutionalized*, *discourse*, and *radicalism*. Furthermore, she explained that her analysis addressed how concepts become marginalized. Nordenmark and Nyman (2003) concentrated on how individuals construct their gender and the different factors that may contribute to this perception. "The aim of this article is to study the importance of time use, individual resources, distributive justice and gender ideology for perceptions of fairness and understandings of gender equality" (p. 185). The emphasis on gender inequalities made this an excellent advocacy statement.

Other researchers may not have disclosed a clear-cut stance but instead implied one through their choice of language. In Hollingsworth's (2004) purpose statement, the author sought to find individual and systemic predictors of custody cases that involved mothers with severe mental illness (SMI). An understanding of power dynamics was implicit in the purpose statement: "The purpose of this study, therefore, was to test the hypothesis that certain individual and environmental factors identified in earlier research would combine with the presence of persistent SMI to predict a history of child custody loss" (p. 200). Kumar and colleagues (2000) and Shapiro et al. (2003) took this one step further by purporting that their research aimed to influence policy regarding drug users, implying environmental causes and solutions. For instance, they indicated,

> The aim of this article is to stimulate further debate about the importance of using a variety of research methods to explore sensitive health issues, to capture the complexity of women's experiences, and to privilege the voices of older women in the policy process. (Shapiro et al., 2003, p. 22)

The emphasis on systemic concerns such as policy and the privileged status given to older women makes this a good advocacy question.

Did the literature review include discussions of diversity and oppression? The articles were examined for how well the authors addressed dimensions of diversity (e.g., social class) and oppression. Six articles discussed issues of diversity or oppression in their literature reviews but varied in the type of literature they discussed. Cartwright et al. (2006) summarized the diabetes literature to provide an example of how Mexican immigrants were disenfranchised in Anglo society. Freeman (2000) discussed the family therapy literature to highlight its feminist-informed components. Hodgkin (2008) summarized the literature on social capital and noted its deficiencies in addressing issues of gender, race, and class. Hollingsworth (2004) addressed the literature on women with mental illness to note socioeconomic factors such as poverty as risk factors. Nordenmark and Nyman (2003) discussed research on the division of labor to highlight gender inequities. Tolman and Szalacha (1999) reviewed feminist literature to highlight its weaknesses in addressing girls' sexuality.

Some researchers made issues of diversity a central focus of their literature reviews. The elaboration on one element of diversity (e.g., gender) can provide a rich illustration of power dynamics. Freeman (2000) mostly reviewed the literature for feminist points of view in family therapy. Nordenmark and Nyman (2003) provided a detailed discussion about how perceptions of gender inequality interact with other elements of diversity such as economic resources:

> For this [an equal society] to be possible, at least two things are necessary: men and women must have equal chances on the labour market, and both must share the responsibility for home and children . . . Despite this fact, and the fact that the distribution of labour is more equal now than a generation ago, statistics show that paid employment and housework are still shared according to traditional patterns. (p. 182)

Tolman and Szalacha (1999) explicitly addressed "patriarchical suppression" and "women's oppression" in their review (p. 8).

An alternate way to incorporate issues of diversity was to highlight different aspects of it within one study. Hodgkin (2008) explained gender differences in social capital, organizational membership, and predominance in unpaid domestic roles:

> Although acknowledging that there may be different types of social capital, the research drawing on it has shown limited sensitivity inequalities associated with gender, race, and class where being civic or caring for others means different things to different people . . . Structural inequities of gender, age, and class are very closely related to distribution of civic resources (Norris & Inglehart, 2003) . . . The gender-neutral examination of social capital is concerning, as it fails to consider long-established structural inequalities. (p. 3)

In their review, Cartwright et al. (2006) discussed acculturation, binationalism, and immigration status:

> Late prenatal care is as much about not getting in for a sonogram and a supply of prenatal vitamins as it is about the terror of being discovered as "illegal" when applying for services at the clinic and subsequently being deported for immigration violations. It is also about the realities of navigating the U.S. legal system . . . the social and political realities of the immigrant situation often take precedence in both individual conceptualizations of why health problems occur as well as in, ultimately, if an individual receives treatment. (p. 92)

Ferree (2003) introduced the notion of radical identities. Hollingsworth (2004) identified ethnicity, parenting skill, employment history, and marriage status as relevant factors in women who lost custody battles.

Did authors discuss appropriate labeling of the participants? Although it may be the case that the authors carefully considered how to label participants, it is not evident from their articles. Appropriate labeling was addressed by the authors in only one article. Boland et al. (2008) mentioned that the interviewers used in the qualitative phase were trained in appropriate language and etiquette related to disability. "Five interviewers were given specific training on the social model of disability, etiquette and language when interviewing clients with disability" (p. 201). The authors did not elaborate on what the appropriate language of disability entailed.

Did data collection and outcomes benefit the community? This question reflects the notion of reciprocity or giving back to participants. It is not enough to develop and implement a study that may be useful to the community; there has to also be an attempt to disseminate the findings within the community. A total of 3 of the 13 studies addressed how data collection and outcomes benefited the community. Cartwright et al. (2006) attempted to share the findings with participants as the study progressed: "*Formando* was conceptualized with the idea of sharing the findings with the participants as the study progressed, as well as through

addressing participants' questions during the process" (p. 100). Referrals were another source of reciprocity. Filipas and Ullman (2001) provided their participants "with a list of medical and mental health resources in the community for dealing with rape and other violence and the cover letter to students gave an additional contact for counseling referrals at the university" (p. 676). In addition, Kumar and colleagues (2000) provided free HIV testing and counseling, medical referrals, food, and the prospect of becoming a peer educator.

Did the participants initiate the research and/or were they actively engaged in the project? Four articles mentioned the participants as coresearchers. Cartwright et al. (2006) briefly indicated how their study was successful due to the community members' involvement as coresearchers:

> Engaging Hispanic women farmworkers and their families in the *Formando* project has been somewhat successful because of the manner in which the past projects were conducted by the promotores and because the promotores come from the community and are ex-farmworkers themselves. (p. 105)

This implied that the achievement was due in part to the neutralization of power dynamics. Creating an advisory board with members of the community seemed to be a popular way to involve the community as collaborators. Boland et al. (2008) discussed consulting with an advisory board that consisted of a community member; in addition, the lead interviewer also had a disability. Kumar and colleagues (2000) also utilized an advisory board that consisted of members that varied in religion, caste, politics, gender, and welfare. Shapiro et al.'s (2003) project was overseen by members of OWN, a self-help organization dedicated to promoting the rights and dignity of older women.

Did the results elucidate power relationships? Although some authors framed their study in terms of power imbalances in society, not all discussed these issues related to their results. Generally, findings were integrated with the power literature in the discussion. Eight articles addressed power imbalances. Nordenmark and Nyman (2003) provided a detailed discussion of how their results related to societal power dynamics: "It seems likely that the different areas of a couple's daily life together constitute a whole, which in turn is the basis upon which perceptions of fairness and gender equality are formed" (p. 206). Ferree (2003) highlighted the importance of power dynamics in social change. Tolman and Szalacha (1999) integrated their findings into current feminist theories: "The findings of this study support and extend feminist theory that has asserted that sexual violence is a form of patriarchical oppression, disabling women by dividing them from the pleasure and power of their own bodies" (p. 34). Similarly, Hodgkin (2008) tied the way in which participants constructed their gender back to the literature.

Sometimes, the role of power imbalances or systemic factors was acknowledged by researchers. Hollingsworth (2004) acknowledged the role of power structures in the lives of their participants: "What appear initially to be individual qualities (such as whether or not a woman is married) may actually have environmental (social) effects (such as unmarried or unpartnered people having fewer resources than those married or partnered)" (p. 207). Kumar and colleagues (2000) cited the importance of systemic factors, such as poverty and health care access, in the spreading of HIV. Newman and Wyly (2006) recognized that their results occurred in the context of broader inequalities like race, ethnicity, gender, and class. Shapiro et al. (2003) stated that "it [feminist research] aims to facilitate, in an empowering manner, women sharing their experiences, having input into the research process, and producing more equitable policy outcomes for broader groups of women" (p. 32). Thus, the authors related power to methodology by discussing the effectiveness of mixed methods approaches in fostering social change.

Did the results facilitate social change? In the discussions, researchers stated how their results would help foster social change. This criterion indicates that the authors provided a plan for action in their conclusion. In total, 9 of the 13 articles addressed social change. Ferree (2003) proposed ideas for "cultural transformations" to occur (p. 340). One way to foster change was to provide direct service to the community. Cartwright et al. (2006) disclosed that they shared their findings with the community through health education programs.

Several authors discussed their findings in relation to making changes in policy (Boland et al., 2008; Hill et al., 2002; Hollingsworth, 2004; Newman & Wyly, 2006). In their discussion, Hill et al. (2002) suggested the project they were studying was a more effective model than traditional policies. "The challenging-supportive approach, intensive nature and menu of methods and staff skills are highly unusual at the housing–social work interface and offer a positive alternative to more punitive, legally oriented policies" (p. 88). Hodgkin (2008) offered a suggestion to researchers for making their research more persuasive to policy makers: "Those seeking to influence the policy and practice agenda around women's issues might consider the types of data that are most highly regarded by the audience they are seeking to persuade" (p. 19). Others offered suggestions to practitioners. Boland et al. (2008) called on service providers and policy makers to "increasingly promote health in clients with intellectual disability" (p. 208). Freeman's (2000) discussion highlighted seven suggestions for practitioners on how to include gender in their therapeutic work. Finally, some researchers provided recommendations for how people in an individual's social circle can help foster social change. Filipas and Ullman (2001) provided ideas on how loved ones, peers, or

advocates could help support a sexual assault victim by "refraining from negative reactions" (p. 689). Hollingsworth (2004) offered recommendations to parents diagnosed with severe mental illness and practitioners. Kumar et al. (2000) explained the importance of community outreach and offered ways to provide outreach to the drug-user population. They also suggested that interventions should "target individuals and the social environment (Fisher and Needle, 1993; Rhodes and Hartnoll, 1996) and that they are integrated into the social and political structures of neighborhoods" (p. 95).

Did the authors explicitly state use of a transformative framework? Only two projects explicitly stated that they utilized this framework. Boland et al. (2008) defined transformative research as research that "occurs in partnership with people with disabilities, with an equal relationship between the researcher and the person or group being researched" (p. 200). In other words, their definition only extended to individuals with disabilities and emphasized an egalitarian relationship between the researchers and participants. The authors emphasized that community members should be actively involved at each stage of the process, including helping to obtain funding and assisting in the execution of the research. Hodgkin (2008) discussed the transformative paradigm at length, based on Mertens (2007). She stated that the "ontological assumption of the transformative paradigm holds that socially constructed realities are influenced by power and privilege" (p. 299).

Discussion

In this review of databases, we found a large number (272) of potential mixed methods studies that possibly applied a transformative lens. However, after applying a set of inclusion factors based on mixed methods and transformative criteria, we focused on a much smaller set of 13 articles to serve as examples. From a mixed methods perspective, we chose mixed methods studies that clearly contained both qualitative and quantitative data and that integrated the two data sets. The most popular form of integration for our studies was the sequential form in which one data set extended or added to the other data set. This finding is consistent with the results reported by Bryman (2006) of the form of integration in 262 mixed methods articles published between 1994 and 2003. From a transformative perspective, we narrowed the recommendations for criteria based on Mertens (2003) down to 10 components. This included one that we added relating to whether the authors incorporated a specific discussion about the use of a transformative lens. Our 10 criteria related the Mertens' transformative framework to the process of research: in the introduction, in data collection, and in data analysis, reporting, and use of the results.

The 13 journal articles we selected for review represented a wide range of academic journals, a breadth that had previously been found in our preliminary study (Sweetman, 2008). All 13 articles were from the year 2000 or later, signifying recent studies using a transformative framework. The marginalized participants being examined in these studies ranged from women, to people with disabilities, to racial/ethnic groups. In terms of inclusion of the 10 transformative criteria, the introductions to these studies seldom mentioned the explicit use of a transformative perspective, although most openly declared the use of a theoretical lens. A variety of problems surfaced that related to marginalized communities, and we found several good examples of research purpose statements and questions shaped by their advocacy language. The literature reviews often referred to diversity and oppression. In terms of data collection, only 1 article mentioned the appropriate labeling of participants, but several articles mentioned the participants as coresearchers. The results of these studies cited how the outcomes would benefit the community, and the findings were often documented in the literature on power and oppression. The endings of the articles provided many strategies for explicitly addressing social change as a result of the findings.

Overall, the inclusion of the 10 criteria was uneven. Two articles—Hollingsworth (2004) and Kumar and colleagues (2000)—stood out as exemplary mixed methods studies with a transformative lens. They each possessed more characteristics (6 of 10) than the other studies. In retrospect, the criteria set forth by Mertens (2003, 2009) was seen as an ideal set of characteristics that was not being met in the actual practice of research. Furthermore, the transformative lens can be applied to taking a stand on a broad array of topics and is not restricted only to the basic demographically based advocacy perspectives (i.e., advocacy based on gender, ethnicity, socioeconomic status, or disability status). For example, Kumar and colleagues' (2000) marginalized community of interest was drug users—not a traditional demographic grouping of individuals. Also, it is important to be cognizant of the boundaries of a transformative lens. By virtue of taking a stand, this lens may conflict with a researcher's worldviews. For example, Singer and colleagues (2005) discussed this tension in their study of injection drug users, elaborating that the researchers became viewed as a trusted source of advice to survey participants, which goes against the tenets of an objective, unobtrusive, postpositivist worldview. On the other extreme, the transformative lens can become a blinder. For example, in Hawkins, Roberts, and Christiansen' (1994) feminist-oriented study designed to evaluate a program to help dual-earner couples share domestic labor, one of the 14 couples interviewed was excluded because the husband was not satisfied with handling all the domestic chores himself and wanted his wife to handle more of them. Rather than exploring the opportunity to learn from this exception, this case was excluded because it did not fit the feminist stereotype of the wife handling a disproportionate share of household chores.

To best position a mixed methods study within the transformative framework, we recommend that the authors state in the opening passages of the study that a transformative perspective is being used. This means announcing that a transformative framework will be used in the study, that it relates to a marginalized or underrepresented community, and that there are specific issues (e.g. oppression, power) that researchers need to address about this community. Furthermore, authors need to mention that this framework is being used within a theoretical body of literature, whether that literature is based on feminist research, gay and lesbian research, critical theory, or some other advocacy-theoretical perspective. The introduction also needs to identify the specific issue of the population under study and involve the community of concern in identifying the issue. We also recommend that research questions and purpose statements need to use advocacy language that suggests that an issue exists (e.g., power relationships) that needs to be examined.[3] The type of mixed methods design to discuss in the methods is more than a concurrent or sequential design but one in which the design is framed by a transformative perspective. Creswell, Plano Clark, Gutmann, and Hanson (2003) discussed several transformative design models and offered a visual diagram that might be adapted for a study.

In the actual data-collection process, building rapport with participants is important as well as involving them in the initiation and the design of the study. The idea of the researcher positioning herself or himself was not included in our set of 10 criteria. Whether the researchers are members of the marginalized group being studied is important to understand their issues at a deep level. Finally, most of our studies reviewed contained a plan for change. This plan for change is critical, as it enables authors to be transformative, as opposed to reporting findings and moving on. This means that the mixed methods transformative researcher should not stop at simply describing a problem but suggest solutions for how these problems might be overcome. This section typically ends a transformative mixed methods study.

Despite these strengths, some limitations should be noted. The concept of a transformative lens is vague. That is, it is a theoretical umbrella term encompassing emancipatory, antidiscriminatory, participatory, and Freirian approaches demonstrated in feminist, racial/ethnic minority, disability, and research on behalf of other marginalized groups (Mertens, 1999). With such a broadly encompassing theoretical framework, there are many ways to interpret the application of this lens in studies. Our interpretation is one possible rendering. Also, this was not an exhaustive review of all studies incorporating a transformative lens using mixed methods. Rather, the articles from which we drew our recommendations are a small subset of what we considered to be studies that were the strongest exemplars incorporating both transformative as well as mixed methods perspectives. Finally, as academic researchers, the authors of this article—as well as many researchers working on transformative studies—are part of a privileged class in the privileged nation of the United States. This potential discrepancy between the researchers and participants makes working closely with the community of utmost importance.

Despite these shortcomings, the present study provides a more analytical review of mixed methods studies using a transformative lens than has been found in prior studies. It extends Mertens' (2003) discussion of using this lens in mixed methods studies by operationalizing her criteria and systematically applying it to a select set of mixed methods studies. It examines mixed methods studies using specific criteria for the rigor and persuasiveness of these empirical works. It draws conclusions about the sparse use of transformative criteria in present mixed methods studies, and it suggests that many more mixed methods studies exist that might use this lens than are commonly assumed by authors such as Howe (2004) and Denzin and Lincoln (2005). Finally, this study takes mixed methods and transformative criteria, and our analysis of specific studies, and offers suggestions for ways that mixed methods researchers might incorporate a transformative lens into their studies. In this sense, we hope to stimulate the use of a transformative perspective in research and ultimately help address pressing social issues in our society today.

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Notes

1. By *problem*, we do not mean to suggest something that is wrong with the marginalized community. Although *issue* or *concern* could therefore perhaps be a better word to use, we retain the use of the word problem throughout the article given its more commonly accepted use and understanding.
2. Although the search term *emancipatory* was used in searching for articles, it should be noted that we do not use that terminology in this article. In earlier theorizing, Donna Mertens used this terminology but subsequently dropped it due to potentially negative connotations (personal communication, May 26, 2009). However, we included the term in searching to find potential studies that may have used this older wording.

3. It should be noted that although transformative research can be used for advocacy purposes (i.e., our recommendation), transformative research need not necessarily take an advocacy stance (Donna Mertens, personal communications, May 26, 2009).

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Bios

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