

Recruitment and Data Collection in the 21st Century: Implications for Grounded Theory

Emily J. Cashwell, Institute for Research and Theory Methodologies

Abstract

For many people, many aspects of daily life now occur online. Most individuals are well-versed in communication via email and social media, and many are experienced with audio and video conferencing software as a means to hold business meetings and to connect with family and friends. In addition, the coronavirus pandemic has shifted many aspects of modern life, and some universities have imposed research restrictions that prohibit face-to-face interviews. Because of these changes in the structure of modern social and professional life, researchers are faced with new opportunities and challenges in recruiting research participants and collecting data for their studies. Grounded theorists, in particular, are faced with challenges implementing the research design as it was originally developed within the context of these modern circumstances. This article explores social media and audio and video conferencing software as tools that a grounded theorist might consider for virtual participant recruitment and interviewing.

Keywords: recruitment, data collection, virtual interviews, virtual research environments

Introduction

Technology has opened new avenues for conducting research across vast distances. Within the last decade, researchers have begun to use one form of technology, social media, as a cost-effective way to recruit participants (Fenner et al., 2012) and an effective way to recruit people from within hard-to-reach populations (Gorman et al., 2014; Martinez et al., 2014). It is estimated that in the United States about 72% of people use social media (Pew Research Center, 2021); that number is 57.6% worldwide (Global Webindex, 2021). Further, as of 2016, 79% of internet users in the United States use the most popular social media site, Facebook, and research shows that usage is similar across demographic groups (Pew Research Center, 2016). While not a sole strategy for participant recruitment for every research study, social media may provide researchers with easy access to broad populations of interest and a non-coercive way to recruit interested participants.

Classic grounded theory (GT) is a research design in which all forms of data may be valuable (Glaser, 1978). However, many grounded theorists rely heavily on interviews as primary sources of data. Glaser (1998) described interviewing participants in person without recording interviews or taking notes and then, afterwards, recording field notes, coding, and memoing to prepare for the next day's research. However, while some researchers today have dedicated time to devote to research as a primary responsibility, many academics, students, and other researchers are trying to fit research into already full schedules and cannot devote time to research every day. Additionally, participants may be extremely busy, and it is not always realistic for researchers to expect people to be available for in person interviews. Further, for grounded theory students, recording and transcribing interviews may be a requirement of their doctoral programs; in the era of the coronavirus pandemic, virtual data collection and interviewing may be another requirement. Therefore, it is important for researchers, including GT researchers, to learn about possibilities for and successful application of virtual recruitment and data collection strategies. This article is based on personal experiences conducting a classic GT dissertation study, as well as subsequent grounded theory research, using social media and audio and video conferencing software platforms. In the sections that follow, I will address some of the ethical and practical issues that relate to virtual recruitment and data collection that may be relevant to researchers in general to provide context for a discussion about how these topics relate to grounded theorists specifically.

Deciding to Recruit and Collect Data Virtually

As is typical in a classic GT study, my research began within a substantive area of interest; in this case, the experiences of people who are highly sensitive. I had read research on the trait of sensory processing sensitivity (SPS), the academic term for the trait of high sensitivity, to meet graduate school requirements of a preliminary literature review. Sensory processing sensitivity is a trait found in anywhere from 10-35% of the population that includes greater depth of processing, a lower threshold for becoming overstimulated, a greater degree of empathy and emotionality, and a tendency to detect subtle details in the environment (Aron et al., 2012). Since individuals who are highly sensitive make up a smaller percentage of the population, I was likely to need to sample across a geographically diverse area to increase the chances of recruiting participants who related with my grand tour question. Also, I attended an online university, worked from my home, and moved during my research, leaving me with limited options locally for participant recruitment and data collection via in person interviews. Lastly, as previously mentioned, people are busier than ever and there has been an overall shift from more localized to more virtually-connected lives. Therefore, technological tools for recruitment and conducting interviews virtually were practical for me as a researcher and mostly easy and practical for interested participants.

Social Media Recruitment Process

I initially suggested in my application to my university's institutional review board (IRB) that I would recruit participants via Facebook. After some discussion about this strategy, I was encouraged to add another social media platform to balance out the risk of bias created by recruiting within my own social network. Therefore, I added the strategy of recruiting via Nextdoor, which is a localized community networking site. After IRB approval, I posted the

recruitment post to my Facebook page. The post explained that I was looking for participants to interview on my topic area of interest. I did not use the word “sensitivity” in my recruitment post; instead, I asked for interested participants who could talk about being “deeply affected by people and situations.” It is a requirement of modern IRBs within the United States, to inform participants about the topic of the research. I honored this ethical imperative while avoiding sharing any more about what I was looking for or naming “sensitivity” as a concept.

In my recruitment post on Facebook, I asked people to contact me by email, phone, or Facebook messenger, either with questions about the research or to express their interest in participating in an interview. The post further requested that study participants share the post with others they knew who might be interested or to share the post to their own Facebook walls. Since I have a private Facebook account, I had to make the post public to do this.

After posting to Facebook, I posted a recruitment post on Nextdoor in the “general” section. I had to select that I wanted both local neighbors and nearby communities to see the post to increase its reach. The post to Nextdoor similarly explained that I was looking for participants to interview who related with the general topic and requested interested participants contact me via email, phone, or Nextdoor private message. In both instances, I minimized risks by allowing participants to self-identify as interested in the topic and to choose whether they wanted to respond or forward the recruitment post to others.

Virtual Interview Design and Process

During my research project, I interviewed different participants via email, audio conferencing software, and video conferencing software. I offered all participants the choice to be interviewed via email so that they could have asynchronous communication with me if necessary or desired. I offered the choice initially to be interviewed via the audio-conferencing software FreeConferencePro, which would allow me to record interviews and was as simple for participants as dialing a phone number. Using this software also allowed me to conduct virtual synchronous interviews with participants without the need to exchange personal telephone numbers.

For practical reasons, after a few interviews, I switched to using the video conferencing software GoToMeeting and continued to offer email as an asynchronous communication option. GoToMeeting allowed me record interviews and had an option through which I could have them automatically transcribed. While GoToMeeting is designed for video conferencing, I only ever chose to use the audio component. I believed that this would foster a sense of privacy and make it more likely that I would “instill a spill” (Glaser, 1998, p. 111) in participants sharing about their personal, potentially vulnerable, experiences with the research topic. However, choosing not to offer a video component also meant that I likely missed visual cues that might have provided valuable observational data and that, in the absence of seeing each other, more effort was needed to build rapport with participants.

Ethical Considerations for Social Media Recruitment

Social media is widely used throughout the United States and the world. Thus, it offers a convenient way to access a broad range of people across vast distances. However, like any

form of participant recruitment, recruitment via social media also carries inherent risks; in this case, the protection of participant privacy and confidentiality were my biggest ethical concerns.

To protect the privacy and confidentiality of participants, I stated in my recruitment posts that I wanted people to contact me by email, phone, or through Facebook or Nextdoor private message, rather than to comment directly on my posts. I further informed interested participants that any comments on the Facebook recruitment post would be visible to others until I was able to delete them; this might allow others to become aware of individuals who were interested in participating. Nextdoor, on the other hand, allows users to disable comments on their own posts, which I did. Lastly, I stated that I would make every effort to delete comments posted on my Facebook recruitment posts as soon as possible.

Ethical Considerations for Interviewing Virtually

Ethical considerations of using audio and video conferencing software for data collection revolved around privacy and confidentiality of participants as well. I recorded interviews within the conferencing software to the cloud with participants' permission and then had them transcribed by a third party. While Glaser (1998) strongly advised grounded theorists to avoid recording interviews, it was a requirement of my doctoral program, as it is for many students doing dissertation research using GT. Most participants consented to the recording; for the few who did not, I took field notes and was still able to incorporate conceptual insights from their interviews.

To make participants aware of any risk of loss of privacy or confidentiality during the research project, I included a link in my informed consent document to the privacy policy of the conferencing software. I informed participants that recordings would be deleted from the cloud immediately after downloading them and deleted from my personal computer after transcription. Further, I let participants know that transcribed interviews would be de-identified and stored separately from informed consent documents or any other identifying information on my own personal, password-protected computer. Lastly, the transcriptionist signed a non-disclosure agreement.

Many of us, researchers or not, use audio and video conferencing software regularly. We must all do our best to make choices weighing the benefits and risks of using these services. De-identifying data, deleting recordings from the cloud, storing identifying information separately from de-identified data, having a transcriptionist sign a non-disclosure agreement, and providing links to the privacy policy of the software used for interviewing allowed participants to make an informed decision about whether they wanted to be interviewed in this way.

Practical Considerations of Social Media Recruitment

While I was successful in recruiting participants through both Facebook and Nextdoor, I faced several practical challenges in the process. First, I had to consider how I would be most likely to reach participants with experiences to share in response to my topic of interest. Since classic GT produces theory and is not used for verification, grounded theorists do not necessarily need to access a large or random sample. However, a strategy I may have used to

expand my reach, particularly if I was not reaching participants who identified with my topic area, would have been to purchase Facebook ads targeting people within my population of interest. Another option would have been to post recruitment materials, with group moderator permission, within specialized public or private Facebook groups centered around the population of interest.

Though I chose not to purchase Facebook ads or recruit in specialized Facebook groups, I was successful at reaching beyond my immediate group of acquaintances to access a broader population. One strategy that helped to reach a broader group of participants was to request in my recruitment post that people share the post to their own Facebook walls, and many friends and acquaintances chose to do this. As a result, people contacted me who had come across my recruitment post but who I had never met. Though I did interview some individuals from my own Facebook "friends list," most participants in my study were people with whom I was not very familiar or with whom I had limited contact. In contrast, I knew none of the participants I recruited through Nextdoor. Therefore, I believe that a combination of two forms of social media recruitment is supportive of recruiting a varied group of participants.

Another practical challenge of recruitment through social media was making decisions about frequency of posting. I wanted to attract the interest of potential participants who might relate with the research topic and to remind participants to reach out if they had originally seen my post with the intention to respond and then forgotten amid life circumstances. However, I did not want to post so often that others were bothered by my posting. Similarly, if potential participants expressed interest in my research but were subsequently slow in responding to messages, I was not sure when or how many times to follow up with them. A general strategy I used was to post recruitment posts every other week and to follow up once with participants who had previously expressed interest in participating.

Practical Considerations of Interviewing Virtually

Unlike scheduling in person interviews, scheduling interviews for virtual data collection meant that I had to schedule across time zones. On multiple occasions, this led to miscalculations and miscommunications about interview start times. Glaser (1998) suggested that interviews should be conversational, and the researcher should feel, to the participant, like a "trusted confidante" (p. 111). Rescheduling interviews due to calculation errors may erode trust and comfort from the beginning. Therefore, it is important to appropriately calculate and communicate meeting times, and it may be prudent to direct participants to a world clock meeting planner.

Another practical challenge of virtual interviewing was a lack of control over the environment. While in person interviews may be scheduled at a specific location of a researcher's choosing, thereby minimizing the risk of potential distractions, virtual interviews can occur anywhere. Therefore, if a participant chooses to set up their computer or call in from their phone in a crowded place, the researcher has little control over all the possible distractions to a free-flowing and open conversation. Further, virtual audio and video interviews often keep participants close to their main sources of communication. Therefore, participants may receive emails or text messages while being interviewed and momentarily lose focus. Unfortunately, this may even happen to the researcher, and it is important to close

applications on phones and computers and set both to “do not disturb” mode prior to an interview, if possible. Also, researchers may wish to provide participants with some interview suggestions prior to the meeting, including finding a quiet, comfortable environment in which the interview can take place.

An additional challenge I encountered during virtual interviews was lack of understanding of the technology; this was also true for participants. Some participants had a difficult time figuring out how to join our virtual meetings, particularly via video conferencing software. Also, in preparation for the first video meeting I conducted after switching from audio to video conferencing software, I emailed an invitation to the participant that included a link to join the meeting via their computer. My intention was that they could either use their phone or use headphones at their computer but that the interview would be conducted using only the audio component of the software. However, I did not realize that I had not disabled video sharing and that participant joined the meeting on video while I was on audio only. I informed the participant that I was going to be doing an audio interview and that they could continue sharing their video or turn it off. However, I learned from that incident that it was important for me to understand the technology better to set up a more seamless experience for my participants. When planning to conduct interviews virtually, researchers may wish to send a set of clear instructions on accessing the chosen software and may want to conduct one or two test meetings with colleagues to ensure appropriate settings are enabled or disabled prior to any interviewing.

The conversational flow of my audio interviews was organic and often evoked deep sharing from participants. However, Glaser (1998) also noted that “interviews without some observations are not embodied by behavior and in this regard not as grounded in meaning” (p. 109). I agree that something was lost in not getting to see the body language of my participants. Even though I recorded interviews, I also took casual field notes while listening, particularly noting moments of emotion or changes in ways of speaking to bring some element of present-moment observation to my interviews. In the future, I would consider conducting both virtual and in person interviews for the ease to myself and participants of the former and richness of data provided by the later. I would also offer participants the option of being interviewed virtually by phone or video to create the interview environment most comfortable to participants.

As far as building rapport with participants, audio interviews were not as much of a barrier as I thought they might be. We began interviews with some casual chatting and if participants were weary of connecting over the phone or being recorded at first, it did not seem evident ten minutes into each interview. I did discover that it is crucial to pause often to ensure the participant has finished sharing before asking any follow-up questions. Pausing is a tool that allows the participant more time to think and begin to speak again, as people tend to like to fill any moments of silence. Since participants could not see my body language, I used my voice and subtle sounds of affirmation to acknowledge that I was listening and interested. Even via technology, I found it easy to be listening and interested throughout the entirety of my interviews, so some of this was likely conveyed organically to the participants.

Making it Work for Classic Grounded Theory

Glaser did not write much about the process of recruiting research participants, as his large body of work has focused mainly on developing and articulating the classic GT research design. Glaser (1998) did, however, express disapproval of the use of certain forms of technology in the grounded theory process, such as taping interviews or using qualitative data analysis software. However, it is still possible to recruit participants virtually and then conduct interviews in person. Nextdoor, for instance, would be a beneficial site for this use.

One important consideration for grounded theorists interested in recruiting participants via social media is that, in grounded theory, all forms of data are seen as potentially valuable for theory development (Glaser, 1978). While recruiting participants via social media lends itself to meeting interested interview participants, it may not be the most appropriate way of searching for other sources of data. Therefore, if a grounded theorist wants to access secondary data, collect survey data, or conduct observations, other strategies may be needed in addition to social media recruitment.

Staying true to the GT methodology, I used emergent concepts for theoretical sampling. Just as I would have had I recruited participants or collected data in physical locations, I identified emergent concepts and determined where I needed to sample next. Through IRB modification, I changed my grand tour question multiple times and posted new recruitment posts requesting interested participants contact me to participate. Because of IRB regulations, I did need to identify my grand tour questions ahead of time; however, I wrote my recruitment posts as broadly as possible, avoiding introducing any obvious concepts, so as not to influence my interviews. I believe that theoretical sampling via IRB modification and social media recruitment was like what I would have done had I not chosen to recruit and interview participants virtually.

Regarding data collection, Glaser (1998) discussed four types of data that a grounded theorist may collect: baseline data, properline data, interpreted data, and vaguing out. He suggested that notetaking and recording of interviews makes it more likely that a participant will supply properline data, which is "what the participant thinks it is proper to tell the researcher" (p. 9). He did emphasize the importance of properline data but believed that recording interviews prevents breaking through the properline data to reveal more of what is going on for participants.

Obviously, some grounded theorists may choose to conduct in person interviews with no notetaking or recording, attempting to get participants to share their best description of their experiences in the casual comfort of the research conversation. However, for those whose daily lives make that challenging or those whose participants may be less likely to sit down for in person interviews, another option, especially for researchers not required to record interviews, is to choose to conduct interviews virtually without the use of recording software. For those required to record and transcribe interviews, virtual interviewing may be the most appropriate option. Further, at the time of this writing, the university I attended currently prohibits face to face interviews due to risks associated with the coronavirus pandemic. Therefore, it is practical and timely for researchers to understand the most effective ways to conduct virtual interviews while staying aligned with the basic tenets of classic GT.

Though I was required to record interviews for the purpose of being mentored on both interview and coding skills during my doctoral program, I was allowed to conduct some interviews taking only field notes, and I chose this option for participants who did not consent to the recording. IRB informed consent procedures through the IRB at my university are currently such that the casual conversations Glaser recommends may not be collected as sources of data. However, casual conversations, while not officially collected as data, did inform my thinking as concepts emerged in my theory. I also collected multiple stories and other sources of media, such as songs, on which I could code and memo without the need for informed consent procedures to better understand emerging concepts.

Another way that virtual interviews may be approached that may support the aims of the grounded theorist is to inform participants of the basic interview process and that grounded theorists care most about what the participant has to share about the topic area. My assumption beginning my own research was that the process of recruitment and obtaining detailed informed consent for participation, even for face-to-face interviews, would already have participants feeling potentially uncomfortable. In addition, some people, myself included, may become overwhelmed when asked a very broad question with no further instruction. Therefore, as part of the informed consent process, I explained to participants in casual conversation what I was going to do in the interview, including asking a very broad question and then listening to everything they wanted to tell me about that topic. I further explained that the interview would not proceed like others they might have experienced, where an interviewer asks a scripted list of questions, but that any follow-up questions I asked would attempt to understand more about what they were saying and what they meant. I made sure participants understood that there was no right or wrong answer in the interview; I explained that, for the purposes of GT, anything that was relevant to them would be relevant to me. I believe this put participants at ease, and my sense in most of my virtual interviews was that participants shared authentically and comfortably.

Implications for Practice

Recruitment via social media and virtual interviewing are viable options for researchers, including grounded theorists, in the 21st century. However, there are ethical and practical considerations for researchers that may aide them in the process of utilizing these strategies. During Facebook recruitment, grounded theorists may consider asking people to share recruitment posts to their own Facebook walls, purchasing Facebook ads, or posting recruitment materials to specific Facebook groups. While IRB requirements in some areas may include detailed informed consent procedures and informing participants of the initial topic of research, grounded theorists can phrase the topic in the recruitment posts or grand tour questions as broadly as possible, rather than introducing specific concepts, so that participants respond as authentically as possible with whatever thoughts occur to them. Further, explaining the grounded theory research process as a casual part of the informed consent process may help participants feel more at ease and be less likely to supply only properline data.

For virtual interviews, a grounded theorist may benefit from making recommendations to interested participants that they find a quiet location in which to participate. Further, it may be prudent to send instructions on accessing the audio and video conferencing software so that

participants are more familiar and comfortable with the process, and the interview experience can be a more seamless one. Researchers can use a world clock meeting planner to verify accurate meeting times with participants and send calendar invitations that feature converted times for both researcher and participant. Because IRB requirements may necessitate a detailed informed consent process for the collection of any data with human subjects, it may be beneficial for grounded theorists to collect sources of secondary data or to code blogs, videos, or other written materials that authentically express peoples' thoughts without the formality of modern research interviews.

Conclusion

As technology swiftly evolves, researchers have many new technological options to aid in all parts of the research process, including recruitment and data collection. Peoples' lives are increasingly located online and, while data may be rich from traditional in person interviews, certain topics of study and certain populations or people may be easier to recruit online and to approach with the option of using audio and video conferencing software. Further, while Glaser encouraged idea generation through data collected from casual conversations, modern IRB requirements in some locations currently make that impossible. Lastly, as the coronavirus pandemic shaped our lives in unexpected ways over the last year and a half, many researchers were restricted in data collection activities. Therefore, it is timely for classic grounded theorists to consider ways they might stay true to the methodology in the context of current circumstances.

Overall, I had a wonderful experience recruiting and interviewing participants virtually. Social media proved to be an effective starting point to reach interested participants, and then I was able to create some of the casualness and ease I wanted to create through conversations with participants prior to our interviews. Also, I was quite comfortable with the interview process, and most of my participants shared freely and deeply and aided my process of developing a theory that transcended my original area of interest. While virtual interviews may not be the standard, particularly in GT, they offer a tool for researchers to reach a wider audience, schedule more easily with busy individuals, and with which some researchers and participants both may be more comfortable. Therefore, as technological tools continue to be developed and online communications increase in frequency, it is worth it for researchers to at least have some ideas about how they might use these technologies in their own research.

References

- Aron, E. N., Aron, A., & Jagiellowicz, J. (2012). Sensory processing sensitivity: A review in the light of the evolution of biological responsivity. *Personality and Social Psychology Review, 16*(3), 262-282. <https://doi.org/10.1177/1088868311434213>
- Fenner Y., Garland S. M., Moore E. E., Jayasinghe Y., Fletcher A., Tabrizi S. N., Wark J. D. (2012). Web-based recruiting for health research using a social networking site: An exploratory study. *Journal of Medical Internet Research, 14*(1), e20. <https://doi.org/10.2196/jmir.1978>

- Glaser, B. G. (1978). *Theoretical sensitivity: Advances in the methodology of grounded theory*. Sociology Press.
- Glaser, B. G. (1992). *Basics of grounded theory analysis*. Sociology Press.
- Glaser, B. G. (1998). *Doing grounded theory: Issues and discussions*. Sociology Press.
- Global Webindex. (2021). *Social: GWI's flagship report on the latest trends in social media*. <https://www.gwi.com/reports/social>
- Gorman J.R., Roberts S. C., Dominick S.A., Malcarne V. L., Dietz A. C., & Su H. I. (2014). A diversified recruitment approach incorporating social media leads to research participation among young adult-aged female cancer survivors. *Journal of Adolescent and Young Adult Oncology*, 3(2), 59-65. <https://doi.org/10.1080/15265161.2016.1276644>
- Martinez, O., Wu, E., Shultz, A. Z., Capote, J., Rios, J. L., Sandfort, T., Manusov, J., Ovejero, H., Carballo-Diequez, A., Baray, S. C., Moya, E., Matos, J. L., DelaCruz, J. J., Remien, R. H., Rhodes, S. D. (2014). Still a hard-to-reach population? Using social media to recruit Latino gay couples for an HIV intervention adaptation study. *Journal of Medical Internet Research*, 16(4), e113. <https://doi.org/10.2196/jmir.3311>
- Pew Research Center. (2016). *Social media update: Facebook usage and engagement is on the rise, while adoption of other platforms holds steady*. file:///Users/emily/Downloads/PI_2016.11.11_Social-Media-Update_FINAL%20(2).pdf
- Pew Research Center. (2021, May 24). *Social media fact sheet*. <https://www.pewresearch.org/internet/fact-sheet/social-media/>

Declaration of Conflicting Interests: The author(s) declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

Funding: The author(s) received no financial support for the research, authorship, and/or publication of this article.

© Emily J Cashwell, 2021