

METHODOLOGY AND RESEARCH DESIGN

Research Model: Theoretical Orientation

Trow (1957) made a very important point about research when he wrote that "the problem under investigation properly dictates the methods of investigation" (p. 33). The nature of my research questions suggests that a qualitative research methodology is the best alternative for collecting and analyzing the data. Filstead (1970) describes qualitative methodology as:

...those research strategies which allow the researcher to obtain first hand knowledge about the empirical social world in question. Qualitative methodology allows the researcher to "get close to the data" thereby developing the analytical, conceptual, and categorical components or explanation from the data itself (p. 16).

Using a qualitative methodology I hope to describe and understand how mediums experience the process of becoming a medium without imposing theoretical frameworks that are not systematically derived from their experiences. My goal is to stay as close as possible to the life-world of these mediums as I analyze and present the data. Thus, in my research approach I have been influenced by a phenomenological

perspective (Giorgi, 1970; Keen, 1975).

In general, the research model that I am following is characterized by the following features: emphasis on description of the process of becoming a medium using emic categories; the search for the meaning of this process in the life of the medium; and a conception of research as a collaborative inquiry. First, it is my position that in order to understand the participants' experiences I have to describe these experiences as accurately and precisely as possible using their own concepts. This emic approach is essential in order "to grasp the native's point of view, his relation to life, to realize his vision or his world (Malinowski, 1922, p. 25). Adequate description based on emic categories is in itself a valuable contribution to a research problem. Considering also the fact that we know very little about the process of becoming a medium, it is essential to concentrate on being descriptive in order to provide a more complete picture of this process as it is experienced by the participants.

Second, influenced by this emic approach, my emphasis is on how the participants make sense of those experiences which characterize the process of their becoming a medium. Instead of projecting meaning into that process, I am interested in discovering "what they are experiencing, and how they

themselves structure the social world in which they live" (Psathas, 1973, p. 10). By making explicit the meaning structures used by the participants to interpret their life-world, one is more capable of understanding their thoughts, feelings and behaviors.

Finally, my research model is characterized by the conception that research is a collaborative inquiry which involves the participants and the researcher contributing to the formulation of research questions, hypotheses and final conclusions, among other dimensions. (Heron, 1981; Torbert, 1981). Research as collaboration also involves the researcher participating fully in the action and experience to be studied, becoming more an "observing participant" than "participant observer" (Jules-Rosette, 1975). From this perspective, the researcher's involvement with participants is not seen any longer as a source of bias but as a resource for the discovery of new insights about the research problem (Dwyer, 1982; Katz & Núñez-Molina, 1986; Reinhartz, 1984). In fact, the researcher's own vulnerability in and to the research process opens up new possibilities for such insights (Katz & Núñez-Molina, 1986).

Sample

The sample in this study consists of 16 spiritist mediums who were living in Puerto Rico at the time the field study was done. Of the 16 mediums, there are 10 women and 6 men. The youngest participant is 26 years old, while the oldest is 78 years old. The sample includes participants from different social classes: eight lower-class mediums, four working-class mediums, and four middle-class mediums. Mediums also varied significantly in terms of their academic achievement: 7 of them have completed less than 9 years of school, 5 mediums have completed between 9 and 12 years of school and 4 mediums have a college education.

The mediums also represent different levels of development within spiritist practice. Some of them are beginning to **desarrollar facultades** while others can be considered to be "fully-developed mediums".

When I became aware, during my field work, that there were different types of mediums, I considered two alternatives: limiting myself to the study of one specific type or including different types of mediums. I chose the second alternative because by including different types of mediums I would have the opportunity to correct what seems to be a unidimensional, stereotypical portrayal of mediums which

is so often found in the research literature. In addition, by following this approach I think that a more precise and accurate picture of how **Espiritismo** is actually practiced in Puerto Rico can be offered to the reader. The criteria utilized in selecting the mediums was very much influenced by my interest in including mediums with different kinds of orientation and backgrounds.

I used various procedures for making contact with the participants of this study. First, due to my own personal involvement with **Espiritismo**, I had already established contact with several mediums in Puerto Rico prior to the formal beginning of the field work. I decided to include some of these mediums in the study, considering the advantage of having already established a good relationship with them. I thought that this condition might facilitate the disclosure of life history data.

Second, I have access to an extensive network of **Espiritistas** who are not mediums. I asked them about mediums who might be interested in participating in this study. Several mediums were contacted through this kind of network referral. Third, other mediums were contacted by visiting the spiritist centers in which they were practicing. Finally, through reading newspaper articles about **Espiritismo** in Puerto Rico I was able to find mediums who were interested

in being interviewed about their development as healers. Through this procedure I was able to include mediums from different parts of the Island; mediums who live in rural areas as well as mediums who lived in urban areas.

In addition to these sixteen mediums, I benefited very much from a group of **Espiritistas** who helped me to clarify my thinking in relation to theoretical issues about the spiritist philosophy. Their contribution to this work was also a very important one.

Procedures for Collecting Data

The collection of the data for this study was done in two periods of intensive field work, the first for three months (from February to April 1986), and the second for two months (August and September, 1986). Between the two periods, I was able to reflect on the data collected and do some preliminary analyses. The second period of field work gave me the opportunity to collect missing data and to explore dimensions of the process of becoming a medium which were suggested by data already collected.

I used two major methods of data collection: qualitative interviews and participant observation. The qualitative interview has been defined as a dialogue whose

purpose is "to gather descriptions of the life world of the interviewee with respect to interpretation of the meaning of the described phenomena" (Kvale, 1983, p. 174). Lofland (1971), commenting on the value on this method, stated that the interview is "the fullest condition of participating in the mind of another human being" (p. 2). Therefore, the qualitative interview appears to be the best method for understanding the process of becoming a medium.

In the first period of my field work I frequently used unstructured interviews because I was more interested in knowing the areas that my participants considered to be important. Thus in the first interviews the mediums played a strong role in defining the content and the direction of the conversations. After this initial period, I began to structure the interviews more, using an interview schedule as a guide (See Appendix A). Both open-ended and focused questions were included in this interview schedule.

Although I had developed an interview schedule before the beginning of the field work, I soon realized that several of the questions were not relevant to the mediums. A new interview schedule began to emerge as I started to listen to the mediums. In this sense they helped me to find the questions that I needed to ask them in order to get relevant and meaningful data. Through this process I learned that

"both questions and answers must be discovered from informants" (Spradley, 1979, p. 84). Commenting about this issue, Black and Metzger wrote:

It could be said of ethnography that until you know the question that someone in the culture is responding to, you can't know many things about the responses. Yet the ethnographer is greeted, in the field, with an array of responses. He needs to know what question people are answering in their every act. He needs to know which questions are being taken for granted because they are what "everybody knows" without thinking... Thus the task of the ethnographer is to discover questions that seek the relationship among entities that are conceptually meaningful to the people under investigation (1965, p. 144).

The field work was a process of discovering questions that were meaningful and relevant to the mediums and then learning how and when to ask them.

The interviews were usually held at the participants' home. Most of the time it was possible to conduct the interviews without major interruptions and with a good degree of privacy. This set of conditions made possible the disclosure of intimate experiences on the part of some mediums. I interviewed each participant at least three times; each interview was approximately two and a half hours long. Participants gave me permission to tape the interviews with the exception of one who preferred not to be taped because the tape recorder made her nervous.

The data from the interviews was organized using a life-story approach (Langness & Frank, 1981; Runyan, 1984). This approach is appropriate for the understanding of the mediums' development from their own experiential perspective. Little (1984) proposes that "understanding by comprehension rather than explanation" should be an essential task in a life-story study. The life-story approach is a good way to describe and understand how participants experience their own reality. As Jones (1983) writes about this method:

Of all research methods, it perhaps comes closest to allowing the researcher access to how individuals create and portray the social world surrounding them. The life-history methodology offers an interpretive framework through which the meaning of human experience is revealed in personal accounts, in a way that gives priority to individual explanations of actions rather than to methods that filter and sort responses into predetermined conceptual categories (p. 147).

In addition to qualitative interviews based on a life-story approach, I used participant observation as another method for gathering data. Participant observation has been defined as the method that "involves social interaction between the researcher and informants in the milieu of the latter, during which data are systematically and unobtrusively collected" (Bogdan and Taylor, 1984, p. 15).

Through participant observation at spiritist centers I

collected data about the different kinds of spiritist movements in Puerto Rico. It was essential to participate in the activities of spiritist centers because it is in these places that individuals begin to develop their **facultades** in order to become mediums. In addition several of the mediums of this study were regularly attending a spiritist center. By visiting these centers I was able to observe the mediums working with clients, getting a clearer picture of their healing practices and helping style. When mediums were not attending a spiritist center, I observed them helping clients at their homes. I took field notes on the spiritist meetings emphasizing the role played by the participants of this study.

Procedures for Analyzing the Data

In this study data analysis was an ongoing process that began on the first day of my fieldwork. Thus the division between data collection and analysis is only a theoretical one, not one based on the reality of my fieldwork experience. Data analysis during the research process gave direction to my data collection, helping me to develop a research focus and to reformulate my questions in light of the new findings. By discovering, during my fieldwork, some of the patterns and

categories that were emerging from the data, I was able to do a more in depth examination of them.

Two major methods were used to analyze the data: the general method of the grounded theory approach (Glaser and Strauss, 1967; Glaser, 1978) and the specific procedure of qualitative content analysis (Brislin, 1980; Holsti, 1968; Krippendorff, 1980). The grounded theory approach emphasizes that theories, concepts, hypotheses and propositions should be generated directly from data rather than from other research or theoretical frameworks. This kind of orientation has guided my research from the beginning, but my emphasis has been more on understanding the participant's world-view from their own perspective rather than on the generation of theory. In my view, understanding should precede the development of theories and hypotheses. This method requires that a researcher make a comparison of specific social incidents observed and/or comparison of groups in order to "generate categories, their properties and their interrelations" (Glaser and Strauss, 1967, p. 55).

Although Glaser and Strauss do not mention it, the constant comparative method involves qualitative content analysis. Content analysis has been defined broadly by Holsti (1968) as "any technique for making inferences by systematically and objectively identifying specified

characteristics of messages" (p. 601). In my data analysis, the combination of content analysis with the constant comparative method facilitated the discovery of core categories and their properties, which is a central dimension of the grounded theory approach.

The following are the general steps that I took to analyze the data from the field notes and the interviews:

1. The taped interviews were transcribed.
2. I read all the participants' protocols and my field notes in order to acquire a holistic grasp of the data.
3. The next step involved the coding of all the data in order to identify emergent themes about the process of becoming a medium. I wrote down words and phrases to represent these themes trying to establish a "data index". I searched for regularities in the data, looking for themes that appeared frequently. The coding was done using emic categories and concepts when it was possible to do so.
4. Comparisons between participants and events in the field were made based on the emergent themes. Through this process of constant comparison, new categories and their properties were discovered.
5. An effort was made to identify "core categories" according to the criteria established by Glaser (1978, p.

- 95):
- a. It must be central, that is related to as many other categories and their properties as possible.
 - b. It must reoccur frequently in the data.
 - c. It takes more time to saturate than other categories.
 - d. It relates meaningfully and easily with other categories.
 - e. It is completely variable. Its frequent relations to other categories makes it highly dependently variable in degree, dimension and type.
6. A classification system of mediums and different kinds of spiritist movements was designed utilizing the core categories generated from the data. The primary purpose of creating these typologies was to make the process of description easier and to enhance the understanding of becoming a medium in Puerto Rico.

I recognize that data analysis in qualitative research is a creative process that requires making judgements about what is really significant and meaningful in the data (Patton, 1980). Being aware of this dimension, I made an effort to structure the analysis according to what the participants in this study consider meaningful about becoming and being a medium.

A Note About the Translation Problem

Throughout the writing of this work, I confronted the problem of translating concepts and meaning from Spanish to the English language. Transferring material from one language to another is in itself a methodological problem and a great responsibility for the researcher (Katz, 1982).

I was aware that translating several spiritist concepts into English was not adequate because it could produce a misunderstanding of these concepts. In order to avoid these misunderstandings I decided to use several core spiritist concepts in Spanish and to include a glossary of these concepts as an appendix (See Appendix B). My hope is that this procedure would be more effective for conveying the meanings these concepts have for the participants of this study.

Following this approach, I found it inappropriate to use the concept of Spiritism or Spiritualism as a translation of **Espiritismo**. Although these concepts have been used in the literature, my opinion is that both concepts may lead to a misunderstanding of the practice of **Espiritismo** in Puerto Rico. **Espiritismo** is different from the practice of Spiritualism in the United States and England (Macklin, 1974). Although Puerto Rican **Espiritismo** has its roots in

French Spiritism, it is conceptualized and practiced by Puerto Ricans in a different way. By using the term **Espiritismo** I am trying to emphasize the unique way in which it is practiced in Puerto Rico.

I also have to clarify that I have not followed English style regarding the use of "it" in referring to a spirit. For most of the **Espiritistas**, spirits have gender and unique personalities. Based on this reasoning, I have decided to use the pronouns "he" or "she" when talking about a spirit in order to reveal his/her "humanity".