

MDRC Working Papers on Research Methodology

**Intensive Qualitative Research
Challenges, Best Uses, and Opportunities**

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MDRC

April 2003

This working paper is part of a series by MDRC on alternative methods of evaluating the implementation and impacts of social programs and policies.

This paper was funded by The Pew Charitable Trusts as part of MDRC's Research Methodology Initiative.

Dissemination of MDRC publications is also supported by the following foundations that help finance MDRC's public policy outreach and expanding efforts to communicate the results and implications of our work to policymakers, practitioners, and others: The Atlantic Philanthropies; the Alcoa, Ambrose Monell, Bristol-Myers Squibb, Fannie Mae, Ford, Grable, and Starr Foundations; and the Open Society Institute.

The findings and conclusions in this report do not necessarily represent the official positions or policies of the funders.

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Introduction

Various Methods in Social Policy Research

In the most general terms, social policies are intended to promote the public good by imposing restrictions on people's behavior or by offering them incentives to behave in certain ways, and the objective of social policy evaluation is to determine whether a particular policy is effective. To gather and analyze data for purposes of evaluation, researchers employ a variety of methods: quantitative and qualitative; statistical and interpretive; and synchronic, diachronic, and dynamic. Economists, sociologists, statisticians, and anthropologists may collaborate on a single research project — all with the goal of understanding, to the greatest degree of accuracy possible, whether the policy in question makes a difference. If it does, the researchers try to find out how and to what extent it makes a difference; if it does not, they try to discover how the conditions of implementation may limit the policy's efficacy.

At MDRC — the social policy research organization whose work provides the illustrations presented in this paper — the principal research goal is to determine whether a policy has impacts, or effects, on outcomes of interest. Policy effectiveness is judged in terms of the direction and size of the impacts as well as the degree to which the impacts vary with demographic characteristics. Generally the “queen bee” in a large project, with other types of research supporting its agenda, impact research addresses questions about what happens as a result of a policy or program. Implementation research addresses questions about why or how a policy does or does not bring about its intended effects by investigating the context in which and process by which it is put in place. And client- or participant-centered research aims to uncover how the people targeted by a policy or program perceive it and to understand how it fits into their broader life context. At MDRC, impact and implementation research are based on quantitative methods, whereas client-centered implementation research is primarily qualitative (Brock, 2001).¹

In recent years, there has been renewed interest in making use of qualitative methods to gain a more nuanced understanding of various aspects of the public policy process, especially of the people whose behavior policies are designed to affect. Researchers and policymakers hope that a better understanding of the experiences, circumstances, motivations, and diversity of these “target” populations can inform efforts to improve the focus and fit of programs aimed at making

¹Qualitative methods are also useful in understanding the organizations that operate social programs as well as how staff understand and implement them.

people better off, changing their behavior, or both. Qualitative methods also yield stories and profiles that can be used to make policy research findings more accessible to a nonresearch audience.

The Range and Use of Qualitative Methods

Qualitative methods range in intensity and purpose. At one extreme is what might be called “true” ethnography. The goal of true ethnography is to understand the perspective and culture of a group of people — a community — in order to describe that community’s worldview and behaviors and, often, to shed light on a specific research question. Although ethnographic research can be more or less structured, it always emphasizes being open to the unexpected as a way to learn how community members order and analyze their world. Ethnography is generally carried out over a period of many months or years of intensive interaction between the researcher(s) and the community. It has the advantage of allowing researchers to explore a variety of topics in great depth, to understand how the social considerations influence individual decisions and behaviors, and to pursue emerging issues in a flexible way. At the same time, ethnography is time-consuming and can be expensive. For this reason, less intensive forms of qualitative research are more likely to be used in social policy research (see also Newman, 2001).

Less intensive qualitative methods that offer some, but not all, of the benefits of ethnography are referred to here as *quasi-ethnographic*, although MDRC (and the social policy field more broadly) tends to regard these methods as ethnographic. Periodic interviews conducted over the course of several months or years are one of the more commonly employed quasi-ethnographic methods. By interacting with the same individuals over time, researchers are often able to develop trusting relationships that are similar to those cultivated in ethnography, facilitating the collection of confidential data. This sort of research effectively captures a great deal of information about opinions and perceptions, and, if the interactions take place on the interviewee’s “home turf” (for instance, in the interviewee’s home or workplace), the ethnographer can also gather observational data about actual activities and interactions. But because their visits are scheduled, quasi-ethnographic researchers are unlikely to learn much outside the context of the interview itself. Interviews also tend to focus on individual respondents rather than social groups, such as households or informal networks, that may relate to the policy of interest. Finally, because quasi-ethnographic interviews depend on self-reports rather than gathering naturalistic information, the data are significantly different from those obtained in true ethnography. Making naturalistic observations without conducting interviews, another quasi-ethnographic method, can reveal interesting information about behaviors (such as patterns of interaction or spatial and temporal regularities in individuals’ activities), but it relies on researchers to interpret what they see without the help of the inside view.

A variety of even less intensive qualitative research methods can be helpful in social policy research. These include one-time, one-on-one interviews with open-ended questions and focus groups. Compared with multiple-choice surveys, for example, one-time interviews and focus groups allow for more flexible follow-up on items of interest, and focus groups in particular provide data on community perspectives and the distribution of opinions and experiences. Still, the information gathered through such methods generally lacks context, is dependent on self-reports, and does not benefit from the relationships that ethnographic researchers can develop with respondents.

In contrast to quantitative research methods, where questions and response categories are predetermined, all the qualitative methods described above have the potential to lead researchers to new insights or ideas about how a particular policy fits in a system of interpersonal relationships, individual goals, and the frameworks of interpretation or understanding that people use when making decisions about program participation. The advantage of ethnographic and quasi-ethnographic methods is that they allow researchers to gather information, explanations, and stories directly from the people targeted by a policy and to observe behaviors (including natural conversation) that may belie self-reported statements. Even in the absence of deception, actual behaviors are sometimes at odds with recollections or perceptions. Admittedly, the less intensive qualitative methods — all essentially interview-based — provide only limited information beyond what individuals report. Seeing real behaviors, whether through simple observation or ethnography, can help fill in the gaps in researchers' understanding of why a policy works or does not work; and knowing where self-reported data diverge from actual behaviors can help reveal how and why people make specific choices among program and policy options. This paper discusses the entire range of qualitative research methods but focuses particularly on the more intensive methods to explore how researchers at MDRC and other policy research organizations can make better use of these powerful research tools.

Making Better Use of Intensive Qualitative Methods

MDRC's body of research is a good place to start in an effort to understand what qualitative methods approaches work best in what contexts. Most of MDRC's qualitative research, which has been an integral part of its work for many years, has focused on implementation, that is, how policies are translated into programs and rules. One early example was MDRC's evaluation of the Work Incentive Program (WIN), an initiative designed to encourage employment among welfare recipients; the evaluation was conducted as part of the WIN Research Laboratory Project, which ran from 1978 to 1981. MDRC hired an ethnographer to study WIN inside welfare offices — specifically, to follow several cohorts of participants in a “job club” — with the goal of understanding their participation patterns (Gould-Stuart, 1982). Other examples of MDRC's qualitative work can be found in its extensive field research on program implementa-

tion, which has drawn on data sources including interviews with caseworkers and administrators, surveys of caseworkers, observations of caseworker-client interactions, and case files.

This paper focuses on MDRC's use of qualitative research methods to learn about participants' behaviors. In the four projects examined here, MDRC has wrestled with how to select the research sample and how large a sample to draw; whether to rely on periodic interviews or to incorporate more observational methods; whether to depend on a single ethnographer or to assemble a team; whether to outsource qualitative research or to use in-house staff; and how to engage ethnographers in a productive dialogue with other members of the research team in order to make the best use of insights from qualitative research in analyzing a policy's implementation and effects.

Structure of This Paper

This paper discusses four MDRC projects that have used intensive qualitative methods to understand the experiences and characteristics of the people targeted by the policies under study — New Chance, Parents' Fair Share, the New Hope Project, and the Project on Devolution and Urban Change — each of which has incorporated some qualitative research focused on the people targeted by the program. The paper draws on reports from these projects and on interviews with key MDRC staff members and the projects' outside collaborators. The next section describes each project and its qualitative research element. The third and fourth sections discuss, respectively, the benefits and challenges of qualitative research in the four projects. The final section considers how lessons from the projects can be used to improve MDRC's use of qualitative methods in future research and, potentially, the use of these methods in the broader policy evaluation community.

Qualitative Research in Four MDRC Projects

MDRC has used qualitative research to learn about the people targeted by policies in several of its studies. The four covered here represent a range of interventions and research designs and use a variety of qualitative methods, including focus groups, surveys, interviews, and ethnographic fieldwork (for a summary of their qualitative research characteristics, see the Appendix).

New Chance (1989-1992)

The New Chance demonstration was developed by MDRC in the late 1980s, when concerns about unwed teenage childbearing and welfare dependence — and the effects of these

trends on the children of young mothers receiving welfare — were high. The New Chance program was designed to increase the self-sufficiency of teenage, welfare-dependent mothers who had dropped out of high school by providing them with educational, social, and employment supports. Attainment of the General Educational Development (GED) certificate was a primary measure of program success in the demonstration. It was hoped that after a participant completed her GED, she would continue to build new skills, take advantage of program opportunities, and move toward self-sufficiency.

The New Chance study was conducted in 16 sites around the nation. Qualified sample members were randomly assigned to a program group or a control group (for details, see Quint, Musick, and Ladner, 1994). Program group members received services related to education, employment, life skills, health, and parenting; free child care; and case management. Control group members were excluded from receiving New Chance services but were free to access any other support services available to them.

The basic research design for New Chance encompassed an impact study and a cost-benefit analysis, based on quantitative data on 2,300 women and including a consideration of service receipt and its impact on key outcome measures. Surveys of program and control group members were completed 18 and 42 months after their entry into the study, taking the form of structured interviews that covered such areas as educational attainment, employment, welfare receipt, and parenting behavior. MDRC also collected economic and administrative data on members of both research groups. Although qualitative research methods were included from the beginning of the project (MDRC staff conducted focus groups with teens in Harlem during the planning phase), life histories were added to the research design after the project was under way. An early implementation report based on the 18-month survey noted several problems in the area of program participation: high rates of absenteeism, high rates of program drop-out among women who did not quickly earn a GED, and low rates of program service uptake among those who earned a GED (Quint, Fink, and Rowser, 1991). These findings pointed to the need to find out, from the women's own points of view, whether the program was meeting their needs. The qualitative researchers wrote:

It appeared that a study grounded in a methodology that allowed young women to explain themselves in their own way and in their own words would complement the data already being collected and contribute to an understanding of participants' behavior and their prospects for and progress toward self-sufficiency. Implicit in the decision to conduct the study was the notion that a grasp of participants' subjective experiences — how they construed and interpreted key events in their lives, how they viewed their own actions and those of others — would infuse with greater richness and mean-

ing the quantitative data collected for the impact analysis, as well as the participation data (Quint, Musick, and Ladner, 1994, pp. 10-11).

The qualitative research was based on one-on-one interviews conducted with 50 members of the program group drawn from five of the original 16 sites. Of these 50 program group members, 34 held a GED, and 16 did not. These “one-shot” interviews, each of which lasted from one hour to two-and-a-half hours, were held about 30 months after the start of the program. Staffed by one MDRC staff person and one outside researcher, with assistance from MDRC support staff, the qualitative research was focused on understanding how the life context, experiences, and perspectives of young women affected their participation in New Chance and their success in employment and other subsequent endeavors. The interviews resulted in a stand-alone monograph (Quint, Musick, and Ladner, 1994) and were integrated into the final New Chance report (Quint, Bos, and Polit, 1997).

Parents’ Fair Share (1992-1998)

MDRC also designed, implemented, and evaluated Parents’ Fair Share (PFS). PFS was a groundbreaking program designed to test whether providing a variety of employment-focused supports to low-income, noncustodial parents — the large majority of them fathers² — of children receiving welfare would increase their employment, earnings, and child support payments as well as improve their relationships with their children and with their children’s mothers. The services included a facilitated peer support program, job search assistance and the possibility of education or training, coordination with child support enforcement, and the option of mediation between parents to make child visitation easier. Sample members were recruited from a population of noncustodial fathers who were unemployed or underemployed and not meeting their child support payments. Many were referred to the program by the courts, where they faced legal action to enforce child support payments and collection of arrears.

When PFS began, little was known about the circumstances of low-income noncustodial fathers. One of the early goals of the project developers was to understand better why some fathers in this group do not comply with child support orders. To this end, during the development phase of the demonstration (in collaboration with academic consultants), MDRC conducted a number of focus groups with noncustodial fathers who had a history of noncompliance with child support orders as well as with the mothers of their children. These focus groups helped reveal the motivations, experiences, and circumstances of PFS’s target population. Using exploratory focus group research to guide the design and study of a program was new for MDRC. In recognition of the fact that this exploratory phase had shed light on the realities of

²Therefore, the noncustodial parents targeted by the program are generally referred to here as men or fathers.

the people who would be the targets of the demonstration in a way that surveys or administrative records could not have done, additional and more intensive qualitative research was incorporated into the final research design.

The PFS program was piloted in 1992 and 1993, while the demonstration itself ran from 1994 to 1998. The basic research design entailed random assignment of noncustodial fathers either to PFS or to a control group, and the data sources included surveys of PFS fathers and the mothers of their children, unemployment insurance (UI) data, child support data, and an ethnographic study of PFS group members.

The ethnographic element of PFS — also new for MDRC — was guided by three goals, each with the ultimate objective of informing public policy: to learn about the men who participated in PFS, including how best to design and operate a program to serve them; to find out what importance the program had for them; and to learn about the kinds of setbacks that participants in PFS experienced. The ethnographic sample was composed of 32 men in the PFS group. An MDRC researcher with a background in social policy research carried out the ethnographic study using activity-driven observations related to the PFS program as well as socially interactive observations and other ethnographic methods. Over the course of two-and-a-half years, this researcher kept in contact with men in each of the seven program sites, developing the kind of long-term, trusting relationships that are the hallmark of good ethnographic fieldwork.

New Hope Project (1994-1998)

The New Hope program was designed to supplement the incomes of low-income people living in two high-poverty areas of Milwaukee. Any low-income resident of the target areas who was willing to work at least 30 hours a week, whether a welfare recipient or not, could apply to participate in the New Hope program. Based on the idea that “people who work full time should not be living in poverty” (Bos et al., 1999, p. xiii), the program provided members of the target population with an income supplement that raised their income above poverty, subsidized child care, and subsidized health insurance (if needed). Those unable to secure employment on their own were assigned to community service jobs, that is, subsidized work positions.

In the basic impact research design for this study, which spanned four years in all, applicants to New Hope were randomly assigned to a program group or a control group. In all, 1,357 applicants were included in the study, with 678 in the program group and 679 in the control group. The data included two years of UI records; information on receipt of cash welfare, food stamps, and Medicaid; and a survey that was conducted two years after study entry. The survey measured respondents’ economic well-being and hardship, access to medical care, and feelings about their financial situation.

The qualitative research in this study, which had not been part of the original program design, began in the final year of the New Hope program. It was made possible when the MacArthur Network on Successful Pathways Through Middle Childhood became interested in New Hope and secured additional funding for the surveys and for an ethnographic study focusing on families with preadolescent children. The ethnographic sample of 46 families, half from the program group and half from the control group, was drawn from the subset of people who had at least one child between the ages of 1 and 10 when they entered the study. Data for the qualitative study were gathered initially on a monthly basis and continued over a three-year period, including both interviews and observation.

Project on Devolution and Urban Change (1996-2003)

The Project on Devolution and Urban Change (Urban Change, for short) was designed to study the implementation of the basic federal welfare reform legislation of 1996 — the Personal Responsibility and Work Reconciliation Act (PRWORA) — and its effects on low-income communities and families in four large, urban counties: Cuyahoga (Cleveland), Los Angeles, Miami-Dade, and Philadelphia. This ongoing study incorporates a variety of research methods and topics: cohort analysis of administrative data on welfare recipients; two waves of surveys of families that were receiving public assistance in 1995; a neighborhood indicators component; research on the implementation process itself; a study of the institutions that serve the poor in the study communities; and a qualitative research study of families receiving welfare at the time of their first research interview. Significantly, the qualitative research was part of the initial conception of the project.

Early on, MDRC was interested in ensuring that the sample for the quasi-ethnographic element would be drawn from the pool of families most likely to be affected by welfare reform. In each of the four counties, three target communities were identified, and 30 to 40 residents were recruited in each county to participate in the research. Recruitment was carried out in a variety of ways.³ Participants were informed that they would be part of a long-term research project, and they received compensation for their participation.⁴

³About half the families were recruited through referrals from local service providers and grassroots organizations, while others were recruited by asking initial respondents for names of friends or acquaintances who did not receive services from such agencies. Ultimately, both types of referrals were followed up on to ensure that the sample was about evenly split between those with characteristics of short-term welfare recipients and those with characteristics of long-term welfare recipients (Quint et al., 1999).

⁴Note that, unlike in the other projects, participants in this case did not necessarily participate in a particular program; they were families that were receiving cash welfare assistance at the start of their involvement in the research. While many continued to receive aid after welfare reform, others went off the rolls and did not participate in any program during much of the research period. Thus, in the Urban Change study, the
(continued)

In the Urban Change project, each county's qualitative research team was composed of a local professor or professors, who selected students to work with them. In the beginning, it was expected that one of the lead qualitative researchers chosen by MDRC would coordinate and manage the ethnographic research in all the sites. Over time, however, the teams developed significant working autonomy in each locale. Each team was required to conduct at least one in-person interview with each ethnographic research subject each year for three years. In fact, many of the researchers kept in closer contact with the subjects than that (although, in some cases, ethnographers lost track of research participants when they moved). Ethnographic data — including field notes, interview transcripts, and summaries — from all four counties were entered into a common computer template for group accessibility.

The Payoffs of Intensive Qualitative Research

MDRC's experiences demonstrate that intensive qualitative research brings to light critical information about people's circumstances and motivations that can help explain their behavior with respect to programs and policies. In particular, the qualitative research in the four programs discussed in this paper helped illuminate patterns of service utilization, situate each program in a wider context of supports and demands in people's lives, identify individual differences correlated with different outcomes, and suggest potential program or policy improvements.

Understanding Service Utilization and Program Participation

Qualitative methods were particularly useful in illuminating puzzling patterns of participation and nonparticipation in the programs under study. The intensive and extended contact with program group members (and, in the case of New Hope, with members of the control group) allowed researchers to understand how the services fit into the wider context of people's lives. Issues such as program location, hours, commitment, and atmosphere all factored into people's decisions about whether and to what degree to participate. Personal characteristics and circumstances also affected program participation. Survey responses generally shed little light on these issues. More intensive interviewing or more extended contact, in contrast, allows researchers both to build trust with research subjects that facilitates communication of their viewpoints, including sources of dissatisfaction, and to directly observe factors that interfere with program participation.

ethnography followed the experiences of a group of individuals and families rather than a group of program participants per se.

In the New Hope study, for example, researchers were initially perplexed by the wide variation in the rates at which people took advantage of specific services. Contrary to the initial assumption that participants would use the entire package of benefits to supplement their own efforts to support themselves and their families, most participants made selective use of the benefits. The qualitative researchers were able to show that differences in perspectives regarding the benefits — for instance, in how people weighed the burden of longer work hours against the income supplements and whether they considered the community service job option demeaning — helped account for their patterns of service take-up (Gibson and Duncan, 2000). The qualitative researchers also learned that some participants used the subsidized health insurance — which often required participants to pay significant premiums — not as a continuous form of health care security, but rather tactically: These participants enrolled periodically to pay for special needs (Gibson and Duncan, 2000). This information helped the research team understand how and why participants were not utilizing the full package of supports as expected.

Similarly, in the New Chance study, researchers were initially puzzled by high rates of absenteeism, high program dropout rates among participants who did not earn a GED early on, and low rates of continuation among those who had earned a GED (Quint, Musick, and Ladner, 1994). MDRC invested in lengthy, open-ended interviews with New Chance participants in order to understand these disappointing patterns of program participation, with the shortcomings of interviews — which in this context required participants to recall events that had happened months earlier — well in mind. To give themselves an opportunity to observe program group members' environment and family circumstances, the researchers attempted to conduct as many of the interviews as possible in the young women's homes. The interviews helped reveal what factors were likely to cause participants to drop out, the most common being pregnancy, housing problems, problems finding child care and caring for sick children, and lack of support from family members and partners. Moreover, interviews allowed researchers to plumb for details about these issues. For example, many of the pregnancies initiated after the young women were enrolled in the program seemed to stem from improper use of birth control pills; and lack of support from family appeared to feed into a variety of problems, such as housing instability and unreliable child care arrangements. Although discontinuation of participation or stalled progress appeared rarely to be related to dissatisfaction with the program, this information suggested ways to improve the program and services.

Understanding the Program's Place in People's Lives

Intensive qualitative research has also helped researchers see how the programs under study fit within a broader array of services that people draw on. The most basic insight is that any intervention is only a small part of the package of supports, responsibilities, and activities in people's lives. In *Urban Change*, for example, the quasi-ethnographic narratives reveal how

infrequently welfare recipients must interact with the local welfare department; many women go for months, even a year, without in-person contact with welfare staff. This reality contrasts starkly with the impression that implementation researchers gain from making observations in welfare offices themselves, where meetings to determine eligibility or to assign people to welfare-to-work activities appear to have tremendous significance. These meetings may be significant, but they may be quickly forgotten among the myriad other tasks, relationships, and responsibilities that women on welfare juggle over time.

The interviews in New Chance helped reveal some of the principal contributors to employment insecurity that were not apparent in survey responses. Many of the young women left jobs because of interpersonal — one might say intercultural — conflict with coworkers. In several cases, the women's commitment to their families' needs led to behavior that supervisors saw as irresponsible to the employer. For instance, one woman lost a job because she had taken off a significant number of (unexcused) days to care for a family member who was ill. In other instances, participants encountered blatant racism, and, in others, they bristled at the nonegalitarian structure of workplace supervision. These encounters in the workplace took place outside the reach of the program, and the researchers drew the lesson that programs such as New Chance should consider not only doing a better job of teaching participants about what to expect at work but also of remaining in regular contact with participants during the first weeks of employment. The interviews also illuminated how personal crises (ranging from the need to care for an ailing relative to a second pregnancy) derailed young women from their paths to success.

The ethnographer in PFS found a particularly disturbing set of factors that threatened participation stability. The men in the PFS study faced enormous pressures outside the domain of the program. For instance, some engaged in illegal economic activities, few were unable to find steady work, and many were juggling parenting and romantic relationships with several different mothers of their children. For many of the men, participation in PFS led to increased financial hardship: Days spent in PFS took them away from opportunities to earn money. Some were pressured by members of their family, friends, and partners or girlfriends to leave the program because of the financial strain. Although PFS held out the prospect of a better job in the future, circumstances outside the bounds of the program often overwhelmed their hope of improving their lives through continued participation.

Identifying Differences Among Participants

Several of the studies benefited from the chance to use the detailed qualitative data to identify differences among participants underlying the variation in their behaviors or outcomes. While survey and administrative data allow for analysis of correlations between certain socioeconomic or demographic characteristics and behaviors or outcomes, these characteristics are

usually predefined. Ethnographic research can lead to novel insights about the heterogeneity of participants and how this heterogeneity may explain differential impacts.

New Hope provides a particularly apt example. In the words of one of the researchers, “Our *a priori* theoretical expectations about ‘interesting’ and ‘uninteresting’ situations proved depressingly inaccurate in light of what subsequent analysis of both quantitative and qualitative data revealed to be truly interesting situations for understanding New Hope program impacts” (Gibson and Duncan, 2000, p. 13).⁵ A key finding on variation in program effects emerged from insights into differences among participating families. The qualitative research team began to sense that New Hope worked well for families who were facing moderate difficulties, that is, one or two barriers to higher employment and financial stability. For these families, the program offered enough to help them overcome these problems, connect successfully with opportunities, and pull themselves above the poverty line. But families with more serious obstacles found New Hope relatively unhelpful because their needs were too great, while families without barriers were able to improve their financial circumstances without the assistance offered. This insight, which came directly from the ethnographic research experience, was confirmed by an analysis that showed that barriers at study entry predicted New Hope’s effects on different groups of families. The development of this insight into a testable hypothesis was facilitated by two factors. First, the ethnographic team and the impact team had a high level of interaction, establishing group coherence. Researchers shared information with one another via Web-based data management tools and met to discuss findings. Perhaps just as important, the team had a number of members with both ethnographic and quantitative research skills, making for a seamless transition from ethnographic findings to statistical data modeling and analysis.

The New Chance study team structured its qualitative research to explore the differences between predefined groups of women: those who had and those who had not completed a GED. Yet the interviews led the researchers to conclude that, within the group of women who had not completed a GED, it was also important to distinguish between women who were “detoured” and women who were “derailed.” Those who were detoured had a sense of self-efficacy; many were learning from their mistakes and were juggling a variety of responsibilities, and the researchers felt that they might easily engage in new productive activities when their lives had stabilized. Those who were derailed, in contrast, had greater difficulties at home, fewer personal and social resources to draw on, and less motivation — and were more likely to

⁵For example, one of the most puzzling findings in the New Hope quantitative analysis was that the program had positive effects — such as improvements in social behavior and performance in school — on the adult participants’ male children, but not their female children. This led the qualitative researchers to reexamine their interview notes along gender lines. They discovered that, in many cases, parents talked differently about their boys than their girls. For instance, parents expressed greater concern that their boys would get involved in gangs, drugs, or other negative activities. Consequently, parents were more likely to use New Hope benefits to arrange after-school care for their boys than their girls — a possible explanation for improved outcomes for boys.

lose momentum and less likely to get going again. Although some of these differences may have been reflected in survey or administrative data (for instance, severe housing hardships might correlate with the more dysfunctional family circumstances found among the derailed), the basic insight that emerged from the life histories would not have been captured in quantitative research.

Similarly, ethnographic research in PFS led to the construction of four participant categories: the survivor, the family-oriented noncustodial parent, the man ready to change, and the outsider. The ethnographer wrote: “These are just a few of the typologies that noncustodial parents can fall into as they move in and out of programs like PFS. . . . Failures occurred when the program was unable to engage a participant in a way relevant to him” (Johnson, Levine, and Doolittle, 1999, p. 166). Thus, programs sensitive to these differences in motivation and circumstances are likely to be more effective. Moreover, the ethnographic work in PFS allowed MDRC to understand how differences that are captured by socioeconomic categories are experienced in real life. For example, African-American men in the ethnographic study had less prior experience in the mainstream economy than did their white, non-Latino counterparts, so many of the African-American fathers “were not starting over; they were starting from scratch” in their search for a foothold in the formal labor market (Johnson, Levine, and Doolittle, 1999, p. 68).

Improving Policy and Program Design

Qualitative research can also be seen as a kind of market research. The information that researchers gather by closely observing behaviors and by getting to know how people think and make decisions over time can be invaluable for improving the design of programs and even policies. In particular, qualitative data can help point to ways to improve recruitment and retention (by meeting more of the target population’s felt needs) and targeting (by identifying subtle individual differences that lead to differences in outcomes).

The ethnographic conversations with PFS participants allowed the researchers to identify several areas for potential improvement, including the program itself, employment strategies, and child support enforcement. The resulting recommendations are striking in their adoption of the perspective of the noncustodial parents; they reflect an understanding that if the program doesn’t meet the basic needs of the participants or doesn’t make sense to them, it will fail. As already discussed, a key issue surfaced by the qualitative research was the earnings lost while the men participated in PFS activities. In response, the researchers suggested that the pro-

gram provide participants with a guaranteed job or a stipend during the period of participation.⁶ The researchers also pointed to the harshness with which child support orders were enforced. Many men faced payment orders that did not allow them to retain income for their own subsistence, creating a strong incentive to drop out of the child support system — and PFS — and avoid detection.

The interviews that formed the basis of New Chance’s qualitative research pointed to at least three areas where the program might be improved. Extended contact with program staff after the young women became engaged in their program activities (employment or college) might have helped keep them on track in difficult endeavors, where lack of self-confidence and unfamiliarity with specific organizational cultures often made them want to quit (Quint, Musick, and Ladner, 1994). The interviews also revealed that a large fraction of participants who dropped out left the program due to an unplanned pregnancy related to misunderstanding about how birth control methods worked; specific education on birth control myths and realities might have given them greater control. Finally, a recognition that the young women remained deeply involved in social networks including parents, stepparents, grandparents, peers, and partners pointed to the need for an “ecologically grounded” social policy that would involve key family members and social connections (Quint, Musick, and Ladner, 1994, p. 134). The New Chance researchers suggested that programs for improving the circumstances of teen mothers’ own mothers and partners would bolster the supports aimed directly at the teens themselves.

Improving the Overall Research Design

Qualitative research, especially if conducted early on in a project, can also contribute to the research design itself. In both PFS and New Chance, exploratory focus groups held during the early design phase helped shape the project. Moreover, early information from participants has been used to help frame survey questions in several MDRC projects.

Humanizing the Participants

The qualitative material from all four projects discussed in this paper make another important contribution to the analytic process: They remind researchers, and consumers of research reports, that the people targeted by social programs are human and as diverse, fascinating, and frustrating as people in any circumstances. Unflinching in his depictions of men who

⁶The program’s designers had tried without success to include such income supports in the original PFS package. The qualitative research corroborated their expectation that not providing fathers with ways to obtain income while they participated in PFS would discourage some fathers from participating.

are variously generous, unstable, angry, and resilient, the ethnographer in PFS put it most directly: “The reader may not understand, like, or empathize with the individuals or experiences presented in the following pages. Yet their experiences offer insight into issues of child support, welfare, parenting, and the social and economic conditions faced by low-income non-custodial parents, as these relate to their personal life experiences” (Johnson, Levine, and Doolittle, 1999, p. 15). The qualitative researchers in New Chance emphasized that one of the key findings of the study was that the young women came from very different backgrounds and had different personal resources — skills, motivation, and social supports — to draw on. Furthermore, the researchers noted the importance of the participants’ social worlds: “Who these young women are and what they hope to be are deeply embedded in their interpersonal context — the families in which they were raised and the people who are now significant to them” (Quint, Musick, and Ladner, 1994, p. 125). All these studies use anecdotes, quotations, and portraits of individuals to convey aspects of the encounter between people and policies. This ethnographic material brings to life individuals — and social worlds — in ways that are critical to a grounded, realistic interpretation of impact findings.

The Challenges of Intensive Qualitative Research

The research teams working on New Chance, PFS, New Hope, and Urban Change encountered a variety of challenges to optimal research conduct and analysis. Some of the challenges were logistical, some were methodological, and some were related to the work of integrating qualitative and quantitative work.

In the interviews conducted at MDRC for the purposes of this paper, staff focused more of their comments on logistical than on methodological or epistemological difficulties. Although the questions were framed in terms of intensive qualitative research methods and focused squarely on ethnographic and quasi-ethnographic experiences, staff tended to lump together the wide variety of qualitative methods, from focus groups and one-time interviews to ethnographic research. Perhaps because most qualitative research by MDRC has been conducted in the context of implementation research, staff responses referred more often to implementation research than to research on people’s circumstances. In other words, the distinctions between methods and contexts within the domain of qualitative research seemed blurry to them. This lack of clarity about the place and range of ethnographic methods is itself likely to challenge the full incorporation of such methods into research projects.

Methodological Challenges

The two primary types of methodological challenges discussed by those interviewed were sampling and data systemization and data management.

Sampling

Key sampling issues include choosing an appropriate sample size, the tradeoff between the representativeness and accessibility of the chosen sample, the extent to which the sample would be “randomly” selected, and whether to oversample from groups of special interest.

Each of the four projects confronted the issue of sample size. Qualitative research is time-intensive: As a rule of thumb, researchers assume that for every hour spent in the field, two to three hours will be spent writing notes and transcribing interviews, so every visit to an individual in the ethnographic sample translates into many hours of work producing the data. Large ethnographic samples, in turn, mean large research teams, which present budgetary and logistical problems (see the next section). This problem highlights a key difference between quantitative and qualitative research. Because quantitative research depends on large sample sizes to detect statistically significant differences, particularly if any subgroup analysis is planned, most MDRC impact studies include hundreds, if not thousands, of sample members in each site. The small samples that are standard in intensive qualitative research appear to quantitative researchers to leave this method vulnerable to sampling bias, making them doubt whether anything reliable can be learned from studying a group of, say, 35 participants — an issue of genuine concern in qualitative research.

In many qualitative studies, researchers must make a tradeoff between the representativeness and accessibility of prospective sample members that can ultimately affect the quality of the data gathered. In evaluation research, researchers have a strong interest in selecting an unbiased sample in order to avoid generalizing from data that are not representative of the population of interest. However, from an ethnographic standpoint, there are costs to this pursuit of representativeness. First, because participation in ethnographic studies is usually voluntary, researchers cannot control whether the people who consent to participate are representative of the population.⁷ Second, those who consent may not provide useful information. Some ethnographers downplay representativeness and focus on getting high-quality data by using a convenience sample. For instance, in one famous study, an ethnographer cultivated a relationship with a group of men hanging out on a street corner (Liebow, 1967). Thus, the samples in many quali-

⁷MDRC has been fortunate to have resources to encourage participation in its ethnographic studies.

tative studies are composed of whoever the ethnographer could get to engage in the research voluntarily and provided the richest data.⁸

The population from which to sample is another consideration. Although MDRC's impact research almost always compares program group members with control group members,⁹ its qualitative research has generally focused only on program group members. This makes sense given that many research questions pertain to program participation. Yet this design choice not only limits the compatibility of the qualitative and quantitative analyses; it bypasses a rich source of information about program participation. Just as the comparison of administrative records or public data sources for program and control group members allows analysts to estimate a program's effects, qualitative information about both research groups allows qualitative researchers to compare the strategies and behaviors that might underlie divergent outcomes, shedding light on participation patterns that might not make sense if viewed within the closed universe of the program. New Hope was the first study in which MDRC included members of the control group in the qualitative research sample. This decision was initially a point of contention among the research staff. Including control group members, of course, meant including fewer program group members. One staff member recalled, "Many people felt this [interviewing some control group members] was an absolute waste of resources and a kind of misuse of ethnographic methods." Ultimately, the control group was included, however, and reviewers and team members later agreed that the results were stronger as a result.

Finally, once qualitative researchers have determined the method by which and population from which to draw a sample, getting access to respondents can be a problem. In some cases, program group members are reluctant to participate. In other cases, they are hard to track down: Many low-income people don't have phones or steady addresses and are difficult to get in contact with. Both problems arose in PFS; the fathers were hard to get in contact with and reluctant to cooperate, especially over the long term. In other cases, participants were hard to find because of problems with the program itself. One senior staff person noted that, because of gaps in the ability of one program (not profiled here) to reach participants, the research team had a difficult time finding enough people to interview. He said, "It took forever to find enough people to fill up the sample and the main finding is that we've gone to where people are supposed to be and they're not there." That methodological discovery ultimately led to a finding about the program itself.

⁸Nevertheless, questions remain about whether small samples are representative or merely illustrative. Statistically speaking, if a sample is drawn at random, as was the case in New Hope, inferences can be made from samples as small as 30.

⁹The terms program and control group members are used here for ease of exposition, but this is not to imply that the sample members under discussion in these studies were all randomly assigned.

As in most quantitative research, sampling loomed large in the early decision-making process in these qualitative studies. Researchers had to make decisions about whom to include and exclude. For example, the Urban Change research team struggled over whether white welfare recipients should be included in the ethnographic sample. In some of the Urban Change cities, white welfare recipients were a tiny minority and thus not considered critical to sample, whereas, in Cleveland, for example, whites made up the majority of the population in one of the ethnographic sample sites (the other two were primarily African-American). Excluding this group from the sample would distort the findings about some very poor areas of that city. The research team had to decide whom they were trying to represent. Ultimately, the mostly white group in this Cleveland site was included (Quint et al., 1999). Qualitative researchers must be able to justify their choices regarding whether to oversample certain segments of a population.

Data Management and Data Systemization

The senior MDRC staff interviewed for this paper discussed data management issues related to both the data themselves and the systems used to manage them. They called for systematization of the collection, organization, and analysis of qualitative data.

Particularly in its more intensive forms, qualitative research tends to generate a large volume of data. This can present problems even for projects with one ethnographer, but when research is carried out in a team, the group faces challenges recording and documenting information, ensuring data consistency, and providing a simple method for members of the team to access data from the whole team. Just developing and applying a consistent coding system has proved challenging. Part of the solution can be found in computerized data management, and, over the past decade, commercial software designed to facilitate qualitative data management has been improving. Beyond relying on software, qualitative research teams need clear guidelines to define topics of interest, set standards for field notes (regarding quality, thoroughness, and format), and create opportunities to discuss research findings midstream.

An alternative to commercially available programs is independently designed software. Having begun to develop sophisticated qualitative data management software in the late 1990s, MDRC now allocates a small but significant proportion of its resources to the software's further development and use. The need for this type of investment increased as the projects undertaken by the organization grew and came to encompass more researchers and more sites. While some staff wondered whether the investment would be worthwhile in light of limited organizational resources, others felt the investment would ultimately pay off. One noted that a similar investment in the development of quantitative data management systems at a similar or greater cost had enhanced MDRC's ability to efficiently process, manage, and analyze quantitative data. He suspected that qualitative data software would come to yield similar benefits as qualitative researchers on staff incorporated its use into their research routines. For investment in software to

be maximally useful, staff must be trained in using it, and its uses must be developed from the inception of new projects. Staff members agreed that consciousness and incorporation of the software into the early planning stages of qualitative research would not undermine the open-mindedness needed to conduct qualitative research. Instead, they believed that effective use of the software would likely increase the systematicity of MDRC's qualitative research.

Many staff interviewed called for a more systematic approach to the collection of qualitative data. One staff member characterized the need for systematization as both a qualitative and quantitative issue. He said that users of both methods should focus on developing questions whose answers can elucidate results in the other method. For example, if the answer to an impact question runs counter to expectation, the implementation questions and results ought to be able to offer some explanation in terms of participants' lives or the program's implementation. In order to do this, he said, it is important to develop cross-method protocols that can serve as a road map guiding research conducted in either method. The questions in the protocols should allow for the integration of qualitative and quantitative data and should draw on theory that is based on findings from other studies.

Epistemological Challenges

Writing and Research Products

The senior staff interviewed for this paper agreed that writing up the results of qualitative research requires sophistication and a deep understanding of the context and the environment under study. In other words, there is an art to collecting and writing qualitative material. One qualitative researcher put it this way: "There's much more art involved and in that sense . . . we haven't figured out how to make it into a science and I think we have to go one of two ways — either we have to figure out some ways to make it routinized so that it doesn't require . . . people who have gained the experience of having worked for 40 years in the field and are the most senior people." Writing about intensive qualitative research also takes time, and many qualitative researchers find that the process of writing is intrinsic to the process of analysis. Some qualitative researchers prefer to mull over their data and write in isolation and later share their work with the group. This need for solitude and independence runs counter to organizational norms established at MDRC, where reviews, collaboration, and consultation about writing and conclusions are common. In one case, a project director had to take a strong hand in the development of the final products, which included organizing opportunities to bring the work into forums for discussion with the team and the project reviewers. The director said: "We ended up spending a lot of time trying to figure out how to produce a product that kind of ac-

knowledged the intensity of the topic but didn't . . . walk on land mines. And we did that in two ways, one I got paired with [the researcher, and] I tried to represent varying perspectives.”

Frequently, the writer is the researcher and is very close to the topic, having spent months or years in close contact with the interview subjects. This closeness has raised questions about the objectivity of ethnographic writers (and ethnographic methods). In one case, the conclusions drawn by an ethnographer-writer were hotly debated by reviewers and colleagues who wondered if he was finding out the “truth” or only focusing on his version of it. To resolve this issue, discussion in organized forums was encouraged (and financed), and the project leader brought in a professional writer to help “even out” the passages covering the most controversial topics.

Another problem associated with qualitative research, at least in the short term, is the fact that implementation findings, which are based on qualitative methods, are often eclipsed by quantitative impact findings once they are released. Unlike impact findings, implementation findings are hard to distill into sound bites. As one interviewee put it: “You can say, ‘What was the impact of MFIP or SSP [the Minnesota Family Investment Program and the Self-Sufficiency Project, two welfare initiatives evaluated by MDRC]?’ You get some tantalizing kinds of findings, and if someone said, ‘Well, what was the implementation of MFIP?’ how do you [answer that] — ‘Well, do you got a day?’ You can’t summarize it.” Yet “stories” from qualitative research seem to stay with readers longer than tables or charts.

Organizational Learning

Despite explicit efforts in some projects to encourage dialogue among team members, consultants, and reviewers, MDRC has faced challenges doing so. Research teams have been constrained by tight budgets and/or the logistics of bringing together team members in a way that maximizes opportunities for learning. When cross-pollinating conversations are rare, it is also a challenge to fully integrate what outside researchers are learning into data analyses and research reports. As one of the senior staff interviewed for this paper commented:

On the flip side, because the ethnography was outside of MDRC, it was I think equally difficult for us to fully integrate what they were learning. . . . When they started getting to the point of really having very valuable insights, it didn't flow into our discussions or thinking about the analysis. Quite predictably, really, it kind of flowed up through the universities . . . and some of their ideas were a little bit harebrained but there were others that were extremely good and ultimately did have a lot of influence on how we examined the program's effects.

In order to foster learning between qualitative and quantitative researchers or among qualitative researchers on individual projects, there needs to be a forum for regular intellectual exchange.

Some staff members also described a need to make a science of qualitative research, one that facilitates the transfer of knowledge among colleagues at the senior and junior levels and among projects. They called for a more systematic approach. In the words of one interviewee:

I don't think we've built on the shoulders of prior qualitative research projects as we have in quantitative research. I mean, quantitative research here has gotten better and more sophisticated over time — there's a progression — and I don't think you could say that clearly about the qualitative research. And I don't think there's as much transfer of knowledge or techniques, and I don't think we have a science of how you talk about validity of implementation, the extent of it. Anything that you would measure along dimensions that you could then relate to impacts and talk about the extent to which impacts were greater in sites that did this or that. So we're always struggling with how do we define the quality of implementation, how do we define the quality of programs, and I'm not impressed we've made a lot of progress.

Also, interviewees reported that there is little incentive for the average quantitative researcher to use qualitative findings along the way in collaboration with the implementation team; instead, they generally seek out qualitative findings only when they need them to explain an impact finding. One staff person who manages both qualitative and quantitative research said, “One of the problems is, it's a long time before you actually get to the analysis with the quantitative stuff, there's a lot time spent getting the data, building the files, and so what you hope to do is, through team meetings, help people understand what these programs are, but it's really not until you actually start doing the analytical work that I think people can really focus on that.”

Logistical Challenges

In contrast to the methodological issues, the logistical issues faced by qualitative researchers at MDRC in the four projects discussed in this paper were diverse and numerous. This section describes these problems and discusses the resolutions or lessons learned from them. The logistical issues fall into the following categories: staffing, products/writing, expense, and organizational learning.

Staffing

The MDRC staff interviewed for this paper emphasized the necessity of using experienced researchers to conduct the research and analyze the data. Conducting field interviews and observations is a professional skill developed over time. A thorough understanding of the issues and context under study is also essential for sophisticated qualitative research and analysis. It is difficult for junior research staff to know how and when to probe a response or to follow up in areas of emerging interest in a conversation. Interviewees contrasted this with the collection and initial analysis of quantitative data, where junior staff people can go into the field and collect administrative records or run early statistical analyses without a thorough understanding of the larger research questions. Many of the staff interviewed said that qualitative research is “just harder” to do well and demands more of those doing it in terms of preparation (time) and insight (background). As a result, staffing challenges — including putting together an efficient qualitative research team, hiring local researchers, and gaining access to and using data gathered by external researchers — were mentioned most frequently as difficulties related to carrying out qualitative research.

In a few projects, MDRC staff have carried out all or part of the qualitative research. The New Chance qualitative research team was composed of one experienced MDRC staff member and one contracted researcher. In PFS, MDRC hired an ethnographer to join MDRC as an employee, principally to undertake the ethnography for the PFS project. Having qualitative researchers on staff has some advantages — staff members understand MDRC’s goals and requirements and are in constant communication with MDRC supervisors — but employing ethnographers and researchers with qualitative research backgrounds poses challenges. Some qualitative researchers have experienced role conflicts in the field. When they learn something from their conversations with staff or participants that points to an improvement in program design, for example, they face a conflict between pure research and a quasi-operations role. In other projects, MDRC has used its operations staff — the field staff who participate in site selection and advise and provide technical assistance to staff in the programs under study — to conduct basic qualitative implementation research. A few interviewees talked about the significant amount of useful information that is collected and learned by operations staff that would be useful in the qualitative analysis of programs but said that this knowledge is difficult to capture. One remarked: “Getting away from, ‘Only the researchers can collect anything of validity, and nobody else . . . can make a contribution.’ That’s not a very useful thing to the organization because it’s costly to have two sets of eyes [in the field].” But research staff have found it difficult to extract useful information from the reports of operations staff. Perhaps other means of gathering information from these colleagues would be more effective — for instance, having operations and research team members meet regularly to debrief one another, interviewing operations staff, or using other face-to-face methods to facilitate communication between the two groups.

In many cases, MDRC has chosen to hire researchers in research sites rather than have its in-house staff (based in New York City and Oakland) perform ethnographic research. Hiring local researchers has occasionally proved to be a challenge. In some study locations, it has been difficult simply to find qualified researchers. For instance, in its Scaling Up First Things First project, MDRC had difficulty finding researchers to work in its site in rural Mississippi. Because there were no academic institutions nearby, the team was forced to hire researchers located too far from the study site to visit it regularly. The team also had to rely on some researchers who were inexperienced at interviewing. Both of these concessions affected the quality of the data gathered, producing interviews of less depth than desired. In another project, one prospective local researcher seemed ideal: She was an insider who knew the context and the political landscape in which the study was being conducted. These political connections, however, prompted a rethinking of her role on the research team. Concluding that the researcher was too controversial to conduct the research effectively, MDRC decided not to utilize her services directly. Instead, this local player reviewed the project's data and reports from the perspective of an informed "voice" from the advocacy community. This solution to a politically sensitive issue allowed the organization to profit from a lot of contextual and inside qualitative information without compromising its objectivity.

In three of the four projects under study here, MDRC made use of academic researchers to carry out some of the qualitative research, and, in two of them, academic teams completed most of the ethnographic work. Academic teams offer advantages in terms of cost, experience, and local knowledge, but they also present certain problems.

While the quality of the work done by university researchers hired by MDRC has generally been excellent, the organization has had to adjust to their sometimes very different orientations and motivations relative to those of its in-house staff. For instance, academics are often interested in pursuing theoretical questions that are not of direct relevance to the research program. Also, senior faculty may have many other ongoing projects, while junior faculty face pressures to meet requirements for tenure.¹⁰

Most academics are used to working more independently and with less managerial oversight than are researchers at MDRC. Some, for example, have chafed at MDRC's need for regular progress reporting. This emphasis on independence can undermine academics' management of graduate students and other professional staff on the project. Academics also work on a different schedule than MDRC's, having to handle periodic work crunches during the school year and to meet commitments on campus (such as committee meetings and scheduled exams) that keep them close to home rather than on the road pursuing MDRC's research agenda

¹⁰A particular concern for junior academics is that, in the tenure review process, research published in MDRC reports is usually not given as much weight as research published in journals or books.

at the desired time. Although the university summer break has worked to the advantage of MDRC when contracted academic researchers have used the time to dedicate themselves more fully to an MDRC research project, it has undermined the production schedule when they have chosen instead to dedicate the summer to other projects (perhaps ones that would further their academic career more directly). The university calendar often conflicts with MDRC's year-round schedule.

In two of the four projects discussed here, the academic research teams included graduate students. Relatively inexpensive and highly motivated, graduate students are generally good researchers and have an unusual amount of time to dedicate to intensive fieldwork. At the same time, they can lack maturity, knowledge or experience, and commitment to or interest in the research area. Often in need close supervision and extensive training, they face a steep learning curve. Speaking of graduate student researchers, one MDRC staff member remarked:

[T]hey as a group had to go through the complete learning curve on what [the project] was about and what the program was trying to do. To me [it] felt a little frustrating at times, because there was so much we had already learned and documented. It was very difficult to get them to even sit down and try to understand that work, let alone really incorporate it into what it is they were doing. And I do understand why that happened. I mean, you have to experience something firsthand to have it fully sink in, but because they were so new — in some cases they were just new to the whole field — it took a lot to get them up to speed and get them to be focused on the right things. Early on they would come back with what they thought were these major discoveries, and they would be things that we had been talking about for years or even that were fundamental to the program design. Now to their credit, they matured over time, but we were already starting late, so to lose basically a year just by having to bring an outside group up to speed was frustrating.

A final disadvantage of relying on graduate students is related to the duration of MDRC's research projects. For instance, the quasi-ethnographic element of the Urban Change project extended over four years. During this time, several graduate students working on the project completed their studies and moved on to other jobs. In one case, a new student had to take over where the original researcher left off — a difficult task given that personal relationships and trust are the foundation for access to good qualitative data. Staff turnover can not only disrupt the relationships between researchers and study members but also lead to loss of field notes and experience. For instance, unlike in most quantitative research, it is very hard for anyone else to pick up where an ethnographer leaves off because much of the information collected is based on relationships with informants. In other words, much of what an ethnographer learns stays with the ethnographer.

An additional difficulty that MDRC has faced in working with academic ethnographers (and other ethnographic consultants) is a lack of control over the quality, intensity, and pace of their work once a study gets under way.

Hiring contracted researchers can exacerbate the problems with sharing data and learning from ethnographic results already discussed. One staff member felt that outsourcing had hampered MDRC's ability to learn from qualitative findings because most of the learning took place outside the organization and was difficult to capture:

I think there's been a terrible loss. . . . I think in fact a lot of learning did occur through the ethnography. I just think it's completely based outside of our experience and it's based in these different university centers and we can't extract it in a way that's useful. . . . By the same token, I don't think they feel that they have benefited from what we've really learned about the cities. We're all in our separate silos and we haven't figured out a good mechanism in this project to allow the information exchange to occur.

A number of other issues arose in connection with access to and use of data gathered by researchers outside MDRC, including difficulties arranging regular meetings or progress reports to keep MDRC informed; managing contracted staff, particularly those with many other responsibilities; ensuring that researchers are collecting what is needed; gaining access to the data (a particularly sensitive issue in the case of ethnographic field notes); and analyzing data.

Expense

A number of the senior staff interviewed for this paper talked about the expense of conducting qualitative research. Some attributed budget problems to unrealistic planning — for instance, failures to take into account the necessity of involving senior researchers in qualitative field research. Because staff with more experience are needed to conduct qualitative research, the average cost per staff member may be higher than for quantitative work, where a large part of the data collection and analysis can be conducted by less experienced, and less expensive, researchers. Another factor that may affect the perceived cost of qualitative research is the placement and use of most qualitative findings in implementation reports. Because many readers are primarily interested in impacts, ethnographic findings are often overshadowed by and viewed as less valuable than quantitative findings.

Multimethod Challenges

Despite widespread interest in qualitative methods — as reflected in the allocation of resources to this type of research as well as the appreciation for the potential contributions of qualitative methods expressed both at MDRC and in other policy research contexts — multimethod research often relegates qualitative data to a subservient role. All too often, months' or years' worth of data from interviews and observations are used only as anecdotes to enliven an otherwise dry report of quantitative results, and ethnographers are rarely asked to help formulate the fundamental research hypotheses.

The reasons why qualitative research typically plays a secondary role range from epistemological to social. At the level of epistemology, qualitative and quantitative researchers often have limited confidence in the validity of each other's methods. Qualitative researchers may criticize studies of administrative records as narrow or as reflecting official reports about variables rather than actual values;¹¹ and they may question the validity of surveys dependent on self-reported data, particularly retrospective material. Quantitative researchers, for their part, may have difficulty understanding how to interpret the in-depth material from qualitative research, asking questions like: Were the collection methods rigorous enough? Is the research too dependent upon subjective judgments? How can I tell good ethnography from bad ethnography? Is it possible to generalize from a small sample of individuals, and, if not, what use is the information? Despite an expressed desire to work together, both sides feel distrust that can make it difficult to coordinate analyses. There is no established bridge between qualitative and quantitative methods.

This disconnect can be exacerbated by common (but by no means inevitable) differences in perspective. Ethnographers are generally interested in understanding and describing the perspectives of the people they are studying. While this does not lead directly to advocacy, ethnographers may sometimes find themselves attempting to defend or explain behavior that seems counterproductive or counterintuitive. Quantitative researchers, in turn, may interpret this as a loss of objectivity. Although quantitative and qualitative researchers share the goal of allowing the data to speak for themselves, ethnographers may appear to be speaking for the data (or for the research subjects) in articulating their findings, which are often based on moving, personal stories.

There are also social challenges to integrating qualitative with quantitative methods. For instance, the rhythms of the research process for each are quite different. Ethnographers spend many hours in the field and even more hours writing up notes from their field experiences, usually from the beginning of a project. Quantitative analysts, in contrast, often begin to receive

¹¹For example, UI data do not provide information on informal employment or under-the-table earnings; and welfare files are only as accurate as the clerks or case managers who create them.

data only at the later stages of a research project, sometimes after the qualitative research team has wrapped up its research. By providing little opportunity for qualitative and quantitative researchers to discuss their findings, these different schedules may limit both groups' ability to tell the "truth" about a program. Rarely do qualitative methods seem to change the way a research team ultimately frames and understands a policy's effects. With some exceptions, even respected qualitative research is typically relegated to its own monograph or report in a large research project. This is a key area for improvement in large research projects that employ multiple research methods.

Conclusions

MDRC has considerable experience with a variety of qualitative research methods. Its qualitative research has been used most commonly to study implementation but has also been used to shed light on participants' behaviors, perspectives, and experiences. Across the board, the staff interviewed for this paper evinced respect for qualitative research as a means of learning about the real lives of the people targeted by public policies. A number of staff noted that there were many examples of things that MDRC would not — and could not — have known about a project or program without performing qualitative research. Yet they also expressed lingering doubts about the value to MDRC of applying ethnographic and other qualitative methods to many of the programs it studies. They seemed uncertain about how best to integrate the knowledge gained through ethnographic methods into the broader analysis — that is, how to ensure that MDRC gets a real analytic payoff for its investment.

This conclusion section will avoid summarizing the pros and cons detailed in the sections above in favor of drawing on the interviews conducted for this paper and an analysis of MDRC's research reports to identify some of the most successful uses of qualitative methods.

Best Uses of Qualitative Research

- **Help shape the research design — and the intervention — up front.**

To lay the groundwork for the broader research project, PFS used focus groups in the exploratory phase to learn more about issues facing noncustodial parents, a population about which MDRC knew relatively little. Focus groups played a similarly helpful role in the exploratory phase of Opening Doors to Earning Credentials, an MDRC initiative designed to increase access to and retention in community colleges (Matus-Grossman, 2002). In such contexts, focus groups are an ideal method because they are relatively inexpensive and can provide useful impressions of the circumstances of people who are likely to be the targets of the intervention.

Gathering information ahead of time alerts researchers to the most pressing issues as well as to the values, opinions, and perspectives of the people themselves. This information can inform both the research agenda and the design of the intervention itself.

- **Explore issues or puzzling results as they arise.**

The interviews conducted for the New Chance study were conducted in response to troubling information about participation patterns that had come to light in early implementation research. MDRC realized that its usual research approach would not provide sufficient data to explore these behavioral patterns, so the team secured permission to design a targeted, problem-focused qualitative research component. Perhaps the greatest challenge is to make sure that there are opportunities for the entire team of researchers to discuss puzzling observations early on and to devise ways to address emerging questions in the context of a large, complex research agenda.

- **Improve research tools or program delivery as the project unfolds.**

In part because of the close association between the quantitative and qualitative researchers in the New Hope study, the team was able to use information from the ethnographic work to improve survey questions — adding new questions, adjusting response categories, and the like — so that they would fit the realities of participants' lives more closely. To a lesser extent, this also happened in the Urban Change project, in which the ethnographers had opportunities to comment on both the first- and second-round research instruments. These opportunities arose because, in both studies, an ongoing qualitative research program was under way. In a sense, then, such opportunities are a byproduct of the main program of qualitative research. But unless the whole research team remains aware that this kind of cross-method advising is possible, ethnographers may not initiate the process. It might be useful to build in periodic meetings between ethnographers and survey teams or administrative data analysts in which the ethnographers are invited to comment on the variables under study and the sociodemographic categories used and to create opportunities for ethnographers to keep other researchers informed about the on-the-ground realities in participants' lives.

- **Generate analytic hypotheses.**

In the New Hope study, ethnographic researchers noticed a connection between the degree to which New Hope appeared to make a difference in participants' lives and the degree of hardship that participants faced. Based on this insight, they were able to suggest a new way of predicting impacts based on participants' initial barriers to employment. The ethnographic hypothesis was later confirmed by statistical analysis of baseline data and administrative records. This kind of direct contribution to a broader analysis is rare in multimethod studies. Members of the New Hope research team attribute the success to the fact that some researchers were involved in both quantitative and qualitative research (Gibson and Duncan, 2002), although it

may be possible to encourage this kind of substantive, analytic contribution by including ethnographers in conceptual discussions from the beginning of the project.

Promising Research Designs

There were a few particularly promising design approaches that may be worth using in future research on the targets of public policy.

The first is New Hope's inclusion of control group families in the ethnographic sample. As discussed, this choice met with some initial resistance, principally because it meant that a smaller sample of program group families would be included. Clearly, however, the ethnographers were able to learn valuable information about the strategies that control group members employed and, by analyzing control group members' take-up of ordinary public benefits (outside New Hope), to verify that their categorization of program group members' behavior made sense in the context of low-income parents' lives more broadly — and would therefore have broad applicability (Gibson and Weisner, 2002).

It may, however, be difficult to recruit control group members to participate in a long-term ethnographic study. Unlike program group members, they may not only feel they are not benefiting from the program but also may resent their exclusion from program services. Furthermore, it may not always be appropriate to include control group members. In Urban Change, for example, the concept of a control group is essentially meaningless because of the study's nonexperimental research design. And given that the PFS study was conducted by a single ethnographer, it probably was wise to focus exclusively on the men assigned to the program. Nevertheless, including at least some control group members in random assignment studies when ethnographic research is being undertaken is likely to yield an understanding of how people weigh program options against the alternatives ordinarily available to them.

A related consideration is whether the ethnographic sample should be a subsample of individuals or families who are part of the larger research project. This was the case in New Hope, PFS, and New Chance, but not in the Urban Change study. Differences between the survey sample and the ethnographic sample in Urban Change have made integration of analyses more difficult. It seems clear that, unless there are compelling reasons not to, selecting ethnographic study participants from within the larger research sample fosters comparability and makes ethnographic stories and conclusions more powerful.

Effective Approaches to Management

MDRC's experience with the management of qualitative research has been mixed. One key insight is that it is difficult to balance the need to maintain communication and control over the research process and the production of reports with the need to provide enough openness to allow ethnographers to encounter the unexpected.

At one extreme, the ethnographic research in PFS was carried out by a single researcher. An MDRC employee with access to outside advisors and supervised by senior research staff, the ethnographer was given a great deal of latitude in deciding when to go in the field, what kinds of contacts to make, how long to meet with each noncustodial parent, and how to conduct the visits. Basic questions and issues were formulated in consultation with the research team. The advantage of this structure was that it gave the researcher freedom to form trusting, productive relationships with the men under study, and PFS remains the closest that MDRC has come to conducting true ethnography. The high quality of the information gathered through this process is apparent in the ethnographic monograph from the study (Johnson, Levine, and Doolittle, 1999). The problems with this approach have mostly to do with the process of capturing the information in a project's written products. In this structure, it is almost impossible for anyone but the researcher to extract lessons from the ethnographic experience. In fact, after MDRC determined that sole authorship of the PFS ethnographic report was undesirable for reasons related to deadlines and objectivity, it created a coauthorship team. An alternative approach would be to use small teams of two or three senior ethnographers to push one another conceptually and to produce written products more efficiently.

The ethnographic research team in New Hope was composed of contracted academic researchers. Although a staff member at MDRC was charged with overseeing the ethnographic element, the academic team had a great deal of autonomy and was overseen at the level of the team operations by one of the academic researchers. Overall, both MDRC and members of this research team appear to have been satisfied with the interaction and degree of managerial control. In *Urban Change*, in contrast, management of the ethnographic research team was to be handled by the lead ethnographic researcher and did not involve a committed MDRC staff person in deciding questions of design, research, and reporting. For a variety of reasons, the overall coherence of the *Urban Change* ethnographic experience was not as high as New Hope's.¹² It is important to note, however, that there was significant variation in the degree to which the local ethnographic research teams in *Urban Change* were able to meet MDRC's expectations. For example, the Cleveland team not only provided the requested data in the requested form, gener-

¹²This may have been in part due to personality conflicts that are difficult to anticipate and to academics' lack of experience with being overseen by a peer or a less senior scholar.

ally on time, but also sought out additional funding and undertook supplemental research.¹³ Nevertheless, it appears from these two examples that having a person who works at the organization leading the project and has an understanding of qualitative research serve as liaison to the external researchers may be helpful in ensuring that the external team understands and remains appreciative of the lead organization's goals and requirements. This person may also be able to dispel or soften tensions among the ethnographic team members that could undermine productive teamwork.

Finally, particularly when qualitative research is conducted by contractors, it is important to clarify ahead of time whether the lead organization will require access to the raw field notes or only to other forms of the data. Many qualitative researchers are protective of their field notes, in part as a way of protecting the interests of the research subjects. Moreover, raw field notes are often so copious and, at the same time, telegraphic that they resist analysis by third parties. In the case of unstructured field visits, it may be just as productive — if not more so — for the lead research partner to require ethnographic consultants to supply periodic thematic reports on information gathered in the field rather than the raw notes themselves. A research supervisor could also generate a template for regular reporting on each contact with a research subject, including, for example, the date and time, length of contact, circumstances, topics discussed, and other observations. Ethnographers in both New Chance and Urban Change expressed ambivalence about using software that forced them to chop their notes into decontextualized text boxes. It may be easier for them to use a more flexible software package, such as N5, to search and extract information from longer text reports.

The Path Ahead

A number of challenges must be addressed for MDRC or a similar policy research organization to benefit fully from intensive qualitative research.

Perhaps the most important of these challenges, or at least the one earliest in need of a project's attention, is to set clear goals for the use of qualitative research. As outlined above, qualitative research can accomplish a number of goals — and can best do this when the agenda is clear. Without a clear sense of why qualitative research is being undertaken in a particular project, a research organization risks not only gathering data that do not address any particular question but choosing methods of data-gathering, sampling, and the like that are ill suited to the

¹³In this case, although (or perhaps because) the lead ethnographers in Cleveland were less well-established faculty, they appreciated having access to significant resources and contact with a larger project and dedicated themselves to the project with great enthusiasm.

purposes of the research. Disillusionment with qualitative research may stem partly from a lack of clarity about goals, methods, or expectations about what such research can offer.

It is also important that the scale of the qualitative research effort — which depends on factors such as the timing and duration of the research, the frequency of contact, the sample size, and even the complexity of the unit of analysis (for instance, individuals versus households) — align with the research goals. For example, when the goals are broad and exploratory, using ethnographic methods from the beginning through the end of the project makes sense; and when the research questions are sensitive and participants are likely to be suspicious of the research process, frequent contact with a stable set of researchers is called for. While these guidelines for qualitative research design may appear self-evident, they can be overlooked by research supervisors as they plan a large, complex project.

Research organizations like MDRC also need to find a balance between research manageability and openness to the unexpected. Generally, the more tightly structured and preplanned the research (whether at the level of the project or the field visit), the easier it is to manage. But preplanning can limit the focus of inquiry, reducing the likelihood that the researcher will stumble onto something previously unknown or unconsidered. Clearly, this is a matter of degree: Preplanning can run the gamut from a prepared field guide with set questions or items to observe to a loose agreement among researchers about themes to be investigated. MDRC chooses where to situate itself on this continuum each time it sends qualitative researchers into the field, but paying more attention to the specific tradeoffs underlying this choice will likely lead to better results.

Another important challenge is to integrate ethnographic material more fully into a project's research products. MDRC's stand-alone ethnographic reports have been well received and are highly informative, but ethnographic insights have generally received little weight in its major research reports. In a few cases, ethnographic material has provided an extra dimension of understanding in topical reports, notably in the Urban Change project (see, for example, Polit et al., 2001; Polit, London, and Martinez, 2001). In final reports, however, ethnographic material generally appears, if at all, only in the form of supportive anecdotes or quotations. There are two primary ways to give ethnography a bigger role in a project's written products. The first is to use ethnographic material to augment the impact findings and to shed light on particular aspects of the project's successes and limitations. In this case, ethnography would be used not just to provide "color" but to address the report's central issues with different data. The second is to involve the ethnographers in the report production process from the early outline stage through the final writing stage and to ask them to suggest hypotheses, contribute ideas, and critique the quantitative analysts' storyline. Bringing in the people who have seen the workings of a policy at close range may help the quantitative analysts to view the data in new ways. In this way,

qualitative research can yield more intellectual bang for the buck, whether or not ethnographic material appears as such in written reports.

Finally, two aspects of sampling in qualitative research deserve further consideration: determining the appropriate sample size and integrating the sampling strategy into the overall research design. There is no agreed-upon standard for selecting a sample size for qualitative research, where the issue of statistical significance is moot (but see Gibson and Duncan, 2000, for how even small ethnographic samples can be analyzed to disprove some hypotheses). MDRC has chosen samples of between 35 and 50 individuals per site or per study. Such sizes may provide a degree of comfort for researchers and readers who worry about representativeness, yet it may be possible to achieve the same comfort level with smaller sample sizes — say, 15 per site — with significant cost savings. Here, the issues are manageability, costs, staffing, and the extent to which researchers and research consumers need assurance that the information is not biased by unrepresentative sampling. A related question is whether to select individuals from within the study sample (for example, from the group of respondents to a wider survey) or to select them independently. The ethnographic sample in *Urban Change* was selected independently of the survey sample. Because the ethnographic sample differed systematically from the survey sample with respect to some baseline characteristics, it was difficult to use the ethnographic data to illuminate aspects of the survey analysis. Finally, MDRC's qualitative research has so far focused on individuals rather than communities or households as the unit of analysis. Most of the questions, observations, and investigations are targeted at an individual (who is often, but not always, a program participant). Focusing on an entire household (or a network of friends or close kin) might offer new insights and new information about resource-sharing arrangements and interdependencies that affect individual outcomes. Of course, expanding the unit of analysis likely means sampling fewer units. This approach might make sense when the goal is to investigate the effects on children of adult-focused policies or on adults who are known to have reciprocal social obligations.

Qualitative research has the potential to facilitate a deeper understanding of how and why the people targeted by social policies make the decisions they make. Building on its previous research, and with more awareness of qualitative research design, MDRC is poised to gain much more from these techniques in its future projects. It is hoped that other policy research organizations can glean useful insights and lessons from the experiences documented here.

Appendix

Qualitative Research Characteristics of Four MDRC Projects

	New Chance	New Hope	Parents' Fair Share	Urban Change
Program features	Provided comprehensive education, training, and other services intended to increase the long-term self-sufficiency and well-being of young mothers and their children	Guaranteed people who were willing to work at least 30 hours per week income above the poverty level, access to subsidized child care, health insurance and a paid community service job if they were unable to find unsubsidized employment	Provided employment and parenting supports to help noncustodial fathers comply with child support enforcement judgments	A multidisciplinary longitudinal study of welfare reform in four large urban counties and their major cities — Cuyahoga (Cleveland), Los Angeles, Miami, and Philadelphia
Sample composition	Teen mothers who had dropped out of high school, were receiving welfare, and had volunteered to participate	Low-income residents of two high-poverty areas of Milwaukee, drawn randomly from those with children ages 1 to 10 at the beginning of the study	Low-income noncustodial fathers of children receiving cash welfare who were unemployed and owed child support	Women who in 1995 were receiving cash welfare assistance in selected high-poverty areas of the four counties
Qualitative research sample size	50 program group members, two-thirds of whom had a GED and one-third of whom did not	46 families, half from the program group and half from the control group	32 program group members	Between 30 and 40 program group members in each of the four counties (120 women total)
Length of study	1989-1992	1992-1998	1992-1996	1997-2002
When the qualitative work took place	In the middle of the study	In the middle of the study. The evaluation began in 1994, and qualitative work began in 1998.	At the beginning of the study, but after the demonstration had begun	At the beginning of the study
Frequency of contact	One interview lasting one to two-and-a-half hours	Regular interviews held over a three-year period	At least two formal interviews, plus informal conversations	Two annual interviews, some supplemental contact
Was leadership internal or external?	Internal, with academic consultants	Internal and external	Internal, with outside advisors	External, with MDRC supervision

(continued)

Appendix (continued)

	New Chance	New Hope	Parents Fair Share	Urban Change
Staff size	2 primary researchers, with support staff	More than 10	1 staff ethnographer	4 research teams (one per site)
Were graduate students involved?	No	Yes	No	Yes (plus some undergraduate researchers)
Qualitative research contributions	<ul style="list-style-type: none"> • Explained circumstances and reasoning of GED completers and noncompleters, work, postsecondary education, and subsequent child-bearing • Allowed for categorization of participant characteristics that correlated with program success • Humanized the circumstances of the young mothers 	<ul style="list-style-type: none"> • Found that families with one barrier to work were best served by the program • Clarified information about child outcomes by gender • Clarified non-take-up issues 	<ul style="list-style-type: none"> • Shed light on differences among noncustodial parents • Humanized circumstances of poor noncustodial fathers 	<ul style="list-style-type: none"> • Revealed extent of confusion among welfare recipients about new welfare policies • Showed that many women who were participating as expected still were suffering significant deprivation, as were their families
Qualitative work in written products	<ul style="list-style-type: none"> • Represented in one stand-alone monograph • Was minimally integrated into the final report 	<ul style="list-style-type: none"> • Helped secure funding for further inquiry • Was well integrated 	<ul style="list-style-type: none"> • Represented in one stand-alone monograph 	<ul style="list-style-type: none"> • Integrated into early reports principally as quotations; better integrated into later products

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About MDRC

MDRC is a nonprofit, nonpartisan social policy research organization. We are dedicated to learning what works to improve the well-being of low-income people. Through our research and the active communication of our findings, we seek to enhance the effectiveness of social policies and programs. MDRC was founded in 1974 and is located in New York City and Oakland, California.

MDRC's current projects focus on welfare and economic security, education, and employment and community initiatives. Complementing our evaluations of a wide range of welfare reforms are new studies of supports for the working poor and emerging analyses of how programs affect children's development and their families' well-being. In the field of education, we are testing reforms aimed at improving the performance of public schools, especially in urban areas. Finally, our community projects are using innovative approaches to increase employment in low-income neighborhoods.

Our projects are a mix of demonstrations — field tests of promising program models — and evaluations of government and community initiatives, and we employ a wide range of methods to determine a program's effects, including large-scale studies, surveys, case studies, and ethnographies of individuals and families. We share the findings and lessons from our work — including best practices for program operators — with a broad audience within the policy and practitioner community, as well as the general public and the media.

Over the past quarter century, MDRC has worked in almost every state, all of the nation's largest cities, and Canada. We conduct our projects in partnership with state and local governments, the federal government, public school systems, community organizations, and numerous private philanthropies.