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Discourse Tracing as Qualitative Practice

Marianne LeGreco
University of North Carolina at Greensboro
Sarah J. Tracy
Arizona State University

This article introduces a qualitative research method called *discourse tracing.* Discourse tracing draws from contributions made by ethnographers, discourse critics, case study scholars, and process tracers. The approach offers new insights and an attendant language about how we engage in research designed specifically for the critical-interpretive and applied analysis of discourse. More specifically, discourse tracing analyzes the formation, interpretation, and appropriation of discursive practices across micro, meso, and macro levels. In doing so, the method provides a language for studying social processes, including the facilitation of change and the institution of new routines. The article describes the current theoretical and political landscape of qualitative methods and how discourse tracing can provide a particularly helpful methodological tool at this time. Then, drawing from a qualitative study on of school lunch policy, the authors explain how to practice discourse tracing in a step-by-step manner.

Keywords: *discourse analysis; research methods; critical; interpretive; applied*

The last 10 years has witnessed an increased interest in qualitative, applied, and critical research. Examples of this work are continuing to infiltrate a variety of social scientific disciplines, including communication, education, sociology, management, gender, and ethnic studies (e.g., see Collinson, 2003; Denzin & Lincoln, 2003; Lather, 2004; Madison, 2005;

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Tracy, 2007). These projects have used a range of theoretical approaches such as poststructuralism and genealogy (Foucault, 1972, 1977, 1980), structuration (Giddens, 1984), participatory action and phronetic research (Flyvbjerg, 2001, 2006; Kemmis & McTaggart, 2000; Reason, 1994), and discourses studies (Broadfoot, Deetz, & Anderson, 2004; Fairclough, 1995; Fairhurst & Putnam, 2004). Such approaches share the idea that perception comes from a specific subject position; that the social and historical precedes the personal; and that communication produces identity and knowledge in particular ways, a paradigm that has been collectively characterized by Deetz (2009) as *politically attentive relational constructionism* (PARC). Scholars coming from such approaches often begin their analyses with a social problem or dilemma, followed by an examination of power relations as shaped by organizational structures as well as micro and meso levels of discourse and interaction. The hope of such an analysis is to provide insight regarding transformation and change.

In short, a great deal of scholarly inquiry makes use of critical-interpretive and applied research on issues of language; power; discourse; and context for the purpose of providing grounded, practical insight. In this article, we outline a qualitative practice of analysis called discourse tracing that is specifically suited for such studies. Discourse tracing enables scholars to critically analyze the power relations associated with change and proceed with a systematic data analysis process that is accessible and transparent. In doing so, it provides an important chord to join the fermenting song of qualitative inquiry and performance (Denzin & Lincoln, 2000).

Discourse tracing provides a method well suited for a variety of research projects, drawing upon and extending a rich tradition of qualitative methods and critical-interpretive theory. Projects that might find discourse tracing useful include any issue, case, data text, or process that transforms over time. For example, discourse tracers could examine a change of purpose within a group or organization; the succession of a leader; the effects of a new piece of legislation or policy; differences brought on by militaristic action; relationships as they move through turning points, adjustments due to use of a new technology, a natural disaster; or a sudden change in variables like production costs, mortality rates, or human rights violations.

The article proceeds as follows. First, we discuss the current political landscape of qualitative research and how discourse tracing fits into this environment. We then overview both the methodological contributions that inspired discourse tracing, as well as the extensions of these methods based upon our interests in power, transformation, and phronesis. The heart of the article focuses on the discourse-tracing method in action, drawing on the first author's case study analysis of school meal programs. In this section, we offer a four-part process that accounts for such activities as designing research, collecting data, and moving through a qualitative analysis. We close with a discussion of the method's evaluation, limitations, and a review research questions and conceptual frameworks for which the method is particularly well suited.

Making the Move to Discourse Tracing

Discourse tracing analyzes the formation, interpretation, and appropriation of discursive practices across micro, meso, and macro levels of analysis. The language used in this approach has been inspired largely by the current methodological environment and politics of evidence. Although qualitative, critical, and applied research has been well disseminated along the margins of a number of academic disciplines, much of the research community is skeptical or unfamiliar with approaches that do not align with traditional quantitative methodologies (Cannella & Lincoln, 2004a, 2004b). This environment creates challenges in terms of how to best communicate and earn respect for qualitative research in a landscape marked by a conservative politics of evidence (Denzin & Giardina, 2008). For research diversity to thrive in this environment, "a critical social science must claim a dialogic public position that . . . strives to rethink and reconceptualize the ways we define and conduct research" (Cannella & Lincoln, 2004b, p. 302). Discourse tracing serves as one answer to this call.

Before we clarify the step-by-step processes associated with discourse tracing, we first outline the important conceptual underpinnings of the approach, including our use of the terms *discourse*; *discursive practice*; and *macro*, *meso*, and *micro* levels of analysis. We then situate this approach within the contributions made by critical-interpretive and applied methodologies that guide much qualitative research.

Conceptual Underpinnings of Discourse Tracing

Qualitative scholars have more than a starting point when it comes to the critical analysis of discourse (see Broadfoot et al., 2004; Deetz & McLellan, 2009). These scholars frame discourse using a range of definitions—from all forms of spoken interactions and written texts to the broader social narratives that create and reflect organizational structures (Alvesson & Karreman, 2000; Ashcraft & Mumby, 2004; Putnam & Fairhurst, 2001;

Putnam, Phillips, & Chapman, 1996; Taylor & Van Every, 2000). Discourse tracing both fits within this mix of discourse theories and extends the concepts and research practices associated with these theories.

The development of discourse tracing is influenced heavily by Foucault's (1972, 1973, 1978) work on discursive formations and Fairclough's (1992, 1995) work on discursive practices. In his *Archaeology of Knowledge* (1972), Foucault outlined specific conditions for concepts, statements, and ruptures that give form to a discourse. Moreover, he encouraged researchers to examine the relationships between continuities and transformations. In other words, this work asks us to consider the ways that discourse makes a practice appear routine and how it gives rise to possibilities for change.

In addition, discourse tracing is rooted in the work of critical discourse analysis. Fairclough (1989, 1995) offered a three-dimensional framework that emphasizes linkages across levels of discourse. The first part of his framework focused on *texts,* or various forms of spoken and written language. The next part, *discourse practices,* involves the production, interpretation, and consumption of texts. The final dimension of the framework addresses *social practices,* or broader contexts and institutions. Like Fairclough's work, discourse tracing is concerned with how the production of a text is shaped, reproduced, and reshaped by social practices.

For the purposes of discourse tracing, we rely on a definition of discourse and discursive practices across micro, meso, and macro levels. We treat micro discourses as the local uses of text and language within a specific context. For example, in the first author's study of policy change in school meal programs (LeGreco, 2007), she framed one school's new menu, and the ways in which students and staff used it, as a micro discourse. Additionally, we also consider how these micro discourses are linked across contexts by attending to meso discourses. For example, policy texts themselves can serve as meso discourses, because they attempt to coordinate practices across several local sites. Finally, we frame macro discourses as the broader social narratives and systems of enduring thought (Fairhurst & Putnam, 2004, p. 7) that shape and are shaped by micro and meso discourses. To address these macro discourses, one must often look for the ideologies that are hidden in organizational discourses (Deetz & McLellan, 2009; Mumby, 1987). For example, the first author considered some of the enduring rules of health policy in her school meal study, such as the U.S. Department of Agriculture's longstanding position to eat a variety of foods.

One of the hallmark characteristics of this method is that in addition to highlighting the micro and macro, it also attends discursive properties across levels of practice (see Broadfoot et al., 2004; Conrad, 2004, for examples), particularly the *mesolevel*. In his work on *mesodomain analysis* Hall (1987) made early reference of the need for "transcending the macro-micro distinction, by showing the ways societal and institutional forces mesh with human activity" (p. 10). Similarly, Maines (1982) called attention to the *mesostructure* as a space where social processes and practices are made meaningful through a dialectical play of action and context. Ultimately, more recent appeals for multilevel analysis mirror these early commentaries that emphasize the need to analyze connections *between* local experiences and larger structures (Alvesson & Karreman, 2000).

Discourse tracing provides a complementary method to these conceptual calls for analysis across macro, meso, and micro levels of discursive practice. At the same time, this approach recognizes some of the practical limitations of these conceptual underpinnings. For example, the language offered by Fairclough's work on discursive practices and Hall and Maines' work on mesoanalyses provides a clear process for critically analyzing discourse. However, the systematic ways in which the methods unfold are left implicit. With discourse tracing, we attempt to extend these frameworks to offer a more transparent and explicit way of moving through qualitative data, especially those data that focus on discourse. To do so, we also rely on contributions made by qualitative methodology scholars.

Methodological Roots of Discourse Tracing

In many ways, discourse tracing is situated soundly in qualitative conversations about research design and practice. The method is based upon a critical, poststructuralist epistemology, yet it provides a detailed language and systematic step-by-step analytic procedure that we believe can be understood as rigorous and scientific by a variety of audiences including policy makers, granters, and IRB boards. This is significant because critical poststructural research is frequently (and often unfairly) critiqued as being theoretical, philosophically ambiguous, impossible to evaluate, or difficult to understand (Denzin & Lincoln, 2005). Discourse tracing extends and complements some of the most commonly used approaches to qualitative research, including grounded theory, constant comparison, case study research, and qualitative content analysis.

Grounded theory (Glaser & Strauss, 1967) and constant comparison, especially as articulated by Charmaz's (2000) interpretive reading of grounded approaches, has provided a clear process for many qualitative research projects. Unfortunately, we believe that too often scholars espousing a grounded approach fail to articulate a detailed method that accounts for how their method was actually executed. It is oftentimes difficult if not impossible for readers of grounded theory methods sections to understand how the grounded analysis proceeded or how conceptual themes "emerged." As suggested previously, editorial boards and funding sources have become increasingly concerned with making the methodological process as transparent as possible. We understand the paradoxes, complexity, and fine lines between simple consent and the option to creatively work within the pressures faced by today's methodological environment (Cheek, 2007). By providing a language to describe (and guide) the data analysis and conclusion-drawing processes, discourse tracing can provide qualitative scholars with a way to clearly communicate qualitative inquiry.

In addition to grounded approaches, discourse tracing also pulls from case study methodologies. The case study provides *context-dependent* knowledge that allows people to engage in expert-level activity—a goal in which social science is particularly adept at achieving (Flyvbjerg, 2006). Current research does a good job at providing practical suggestions on how to choose an appropriate case for study (Flyvbjerg, 2006) and how to approach its analysis in terms of research design (Stake, 1995). For example, several case study projects, including Morales-López, Prego-Vázquez, and Domínguez-Seco's (2005) study of organizational change, Tracy and Ashcraft's (2001) study of a school district's diversity policy, and Tracy and Tracy's (1998) study of a 911 call center, offer detailed accounts of the types of data collected and at least a general discussion of how to move through that data.

In order to supplement this case study approach, we turn to social scientists working in political science, international relations, and comparative politics who have made compelling contributions regarding a step-by-step process for case-based analysis. George and Bennett (2005) have advocated the use of *process tracing,* a method that identifies causal processes across time and space, as a way to frame qualitative research projects (see also George, 1979a, 1979b). This approach offers some useful language for analysis, including their method of *structured, focused comparison*, a practice we will address in the following section. Process tracing has been used to illustrate the necessary and sufficient causes for a variety of processes, including revolutions in Russia, China, and France (Skocpol, 1979) and labor movements in Latin America (Collier & Collier, 1991). At the same time, process tracing is often situated within a more positivistic epistemological position. In its present form, the approach might not mesh well with a critical-interpretive perspective. In other words, the emphasis on identifying "necessary and sufficient causes" does not align with concepts of meaning making, discourse, power, and practice that are of primary interest to critical-interpretive scholars.

The final methodological root of discourse tracing is best classified as qualitative content analysis (e.g., Altheide, 1987; Berg, 1995). Similar to content analyses, discourse tracing involves practices, including an initial reading of data for emergent themes and codes, followed by a more systematic reading to lift out patterns. However, discourse tracing differs from content analysis by moving from the *what* to the *how.* For example, qualitative content analysis methods may usefully evidence that women's media portrayals have changed over time (e.g., by counting the number of times women were portrayed as "victims" vs. "experts" on the news each year for the last 10 years). Discourse tracing builds upon questions about presence or prevalence, by examining how various levels of discourse interacted with one another to create or transform a certain phenomenon, policy, or action over time. For example, in terms of the media example, discourse tracers would select various pieces of data (e.g., the equal opportunity amendment, newscasts, editorials, field notes, interviews), set them in chronology, and examine across time to better understand the transformation of women's' media portrayals over a certain time period. In short, discourse tracing moves beyond the number of utterances, items or classifications present, and moves toward asking *how* and *why* such issues came into being and how various levels of discourse play a role in their creation and transformation over time.

Discourse tracing provides new methodological resources for gathering and analyzing data associated with case studies, especially those focused on issues of change. In doing so, it builds from a critical and poststructural epistemology that celebrates the importance of power, multiple levels of discourse, practice, and participant voice. Such a method provides in-depth, thick descriptions of contextual and personal experience. Moreover, this approach can result in rigorous naturalistic generalization (Stake & Trumbull, 1982) in which the reader can put him or herself in the situation and transfer its findings to other practical contexts. With the conceptual and methodological positions that underlie discourse tracing in mind, we now turn to the detailed processes associated with this method of analysis.

Techniques for Discourse Tracing

Discourse tracing involves four distinct phases: research design, data management, analysis, and evaluation (as delineated in Table 1). The first

Table 1
Discourse Tracing Methodological Overview

Discourse Tracing Overview	
Phase	Tasks
Phase 1: Research design	• Define the case using a rupture or turning point • Review the literature to outline potential research directions
Phase 2: Data management	• Gather data from a variety of sources that span micro, meso, and macro levels of discourse • Order data chronologically • Read over this data for emergent themes and issues
Phase 3: Data analysis	• Create structured questions based upon literature and emergent themes and apply those questions to the data • Write the case study based upon answers to structured questions and with a focus upon the formation, interpretation, and appropriation of discursive practices
Phase 4: Evaluation	• Address theoretical conclusions of the case • Develop practical implications and recommendations that may apply to other cases

phase, research design, includes such activities as defining a case and reviewing relevant literature. The second phase, data management, involves gathering data; ordering that data according to chronological processes; and conducting a close reading of the data. The third phase, analysis, consists of both creating and applying structured questions and writing the case study. The fourth and final phase, evaluation, addresses the theoretical and practical conclusions that researchers can draw from a case. Across these four phases, the emphasis remains on the formation, interpretation, and appropriation of discursive practices across micro, meso, and macro levels of analysis. We illustrate the steps of discourse tracing, drawing from a study in which the first author analyzed a school lunch program and the ways participants worked with two new policies to change nutrition practices.

Phase 1: Research Design

Discourse tracing illustrates the interaction of different texts and practices in order to make sense of how actors discursively manage power and transformation. To pursue these goals, the first phase of discourse tracing deals with research design. Within this phase, tracers can expect to engage in two specific tasks: (1) defining a case, and (2) reviewing relevant literature.

Task 1: Define a case. For discourse tracing, defining a case starts with identifying a turning point or rupture in the scene. In other words, researchers define their cases according to significant events or changes that signal moments of discursive organization or reorganization. Foucault (1972, 1973, 1978) has employed a similar strategy in his *Archaeology of Knowledge* to define the emergence and constitution of discursive formations. In his analysis of modernization in Western medicine, for example, Foucault argued that the creation of centralized clinics changed the discursive landscape of medical practice.

As part of defining a case, we urge discourse tracers to incorporate goals from phronesis and participatory research designs (Flyvbjerg, 2006, 2001; Heron & Reason, 1997). In consultation with participants, researchers can generate great insight about what participants want to change or make sense of, something that will have practical value for their everyday lives. By starting with a rupture point defined within researched communities, researchers can move both forward and backward through a case. Both researchers and participants can then illustrate the conditions that gave rise to a turning point and identify how individuals manage their current situation by using discursive rules and resources.

Ruptures can range from a significant change in practice to a subtle shift in daily routines. Some examples include the following: passage of a policy or piece of legislation; the introduction of a new leader to an organization; or a sudden rise in things like production costs, mortality rates, or human right violations. For some discourse tracing studies, this change point will be the primary focus of the study. For others, the rupture will serve only as logistical point of departure and will be backgrounded in order to focus on the discursive practices that followed.

The first author defined her case by identifying a turning point in the form of two new school meal policies in Arizona. On July 1, 2006, Arizona schools implemented both a federal-level mandate to create local wellness policies as well as a state-level policy to limit snack foods and sodas in K-8 schools. Her focus on new policy made discursive ruptures relatively easy to isolate. Specifically, she tracked the timeline of when federal, state, and local policies were formulated, passed into law, and implemented as key moments around which participants organized change. Moreover, she also worked with participants to identify major inspirations for the policies, such as a significant rise in childhood obesity rates.

Task 2: Review relevant literature. Given the similarities of this step to many other methodological approaches, we will forego providing a lot of detail here. Discourse tracing considers relevant literature based on considerations of both emic (inductive, emergent) issues from the case study and etic (preexisting deductive) literature. As such, reviewing relevant literature allows both discourse tracers and their participants to draw out salient concepts and theories. Those who use this method should not bind themselves to previous research or theories. Rather, discourse tracers should use this task as a way to attune themselves to analyses that are theoretically and practically significant and build upon rather than duplicate past research. For example, as part of the school meal study, the first author learned from past literature that health policies are historically paternalistic. In other words, existing literature (e.g., Longest, 2002; Patel & Rushefsky, 1999) suggested that health information is highly complex and constantly changing; therefore, individuals should surrender some of their autonomy to make health care decisions to health experts such as doctors, clinical researchers, or healthcare institutions. As such, she reviewed health policy literature that illustrated the benefits and drawbacks of paternalistic policy making. This attuned her to the possibility that school lunchroom policies might also be paternalistic. At the same time, her use of this literature did not limit focus to an analysis of paternalism; rather, she also addressed the ways in which stakeholders critiqued paternalistic policies and advocated more participatory forms when of making food choices. This enabled her to extend research on health care policy and paternalism as well as shed practical light on the participants' dilemmas and practices about food policies.

Phase 2: Data Management

With a clearly defined case alongside a familiarity with relevant literature, discourse tracing proceeds with the management of data. This phase focuses primarily on data collection. At the same time, discourse tracing also offers some unique strategies for ordering that data once they have been collected.

Task 1: Gather data. The researcher begins to collect data from micro levels (e.g., everyday talk and practice), meso (e.g., organizational policies), and macro levels (e.g., cultural norms) that help to illuminate the discursive practices being investigated. In terms of data collection, the discourse tracing method requires that researchers gather data from as many primary sources as possible (George 1979b). In order to illustrate how discourses operate across micro, meso, and macro levels, discourse tracing pulls from multiple sources of data to support claims about how discourses scale up from and bear down on practices. Ethnographers have suggested that a combination of methods is the preferred way to provide rich, thick descriptions of a cultural experience (Gonzalez, 2000; Tracy, 2000).

Discourse tracers make use of interviews, observations, archival data, public documents, newspaper articles, policy proceedings, transcripts of public meetings, Web sites, blogs, cultural artifacts, or campaign slogans. Data collection can be a lengthy endeavor, as researchers are working with participants as the scene transforms over time. Furthermore, some data are inaccessible, either forgotten, lost, or hidden from the public eye. As such, discourse tracers must contend with the limitation that even the most detailed data are still often incomplete and messy.

The study of school meal policy illustrates how discursive practices are constituted and enacted across micro, meso, and macro sources of data. As mentioned previously, policies are often enacted in local instances of talk and text; therefore, they organize change on a micro level. Moreover, policies also connect practices across contexts; therefore, they are a mesolevel concept as well. Finally, policy also operates on a macro level as it reproduces larger social narratives such as capitalism and democracy. Table 2 offers a summary of the different micro, meso, and macro data sources that contributed to the project as a whole.

Task 2: Chronological ordering. Discourse tracing calls for data to be organized, to the best of the researcher's ability, in chronological order. Chronology is important because it helps researchers to detect the emergence of social processes across time and context. Process tracers would go so far as to say that organizing data chronologically is the first condition for qualitatively identifying causal processes (see George,1979a, 1979b; George & Bennett, 2005; Miles & Huberman, 1994, for more detailed discussions of using qualitative data for predictive and causal studies). More critical-interpretive scholars recognize that chronology is also important because, as Foucault (1972) suggests, we are not interested in history for history's sake. Rather, the historical positioning of events helps us to understand the way things are now, as well as how to change things if the "now" is unacceptable.

The chronological ordering of data is a key feature of discourse tracing that differentiates it from most qualitative practices. Chronological ordering allows discourse tracers to illustrate which discourses are operating in a given situation. At the same time, this practice also enables researchers to articulate those discourses that are absent, forgotten or hidden, a process that Deetz and McClellan (2009) have referred to as distanciation. Broadfoot

Table 2
Discourse Tracing Data

Level of Analysis	Data Type	Data Sources	Hours/Pages
Macro	Formal texts	Child Nutrition and WIC Reauthorization Act of 2004	1 page
	Supplemental texts	National-level promotion materials (e.g., food pyramid)	~85 pages
		USDA/Department of Education policies	~125 pages
	Media sources	*New York Times* articles *Arizona Republic* articles	~200 pages
	Popular culture texts	*Super Size Me* documentary Jamie's *School Dinners* film	~3.5 hours
		Fast Food Nation book *Food Politics* book	~500 pages
Meso	Formal texts	House Bill 2544 (state policy)	~1 page
		Arizona Nutrition Standards	~18 pages
	Supplemental texts	Statewide food service training manual	~300 pages
	Participant observations	Health and Nutrition Services statewide training	~24 hours
		Two statewide meetings of food service directors	~4 hours
		National School Lunch Association food show	~10 hours
Micro	Formal texts	Three local wellness policies: • Eastland District • Longdale District • Westfield District	~75 pages
	Supplemental texts	Local recipes/menus	~55 pages
		Public comments	355 comments
	Participant observations	Local wellness committee	~25 hours
		Food service at six schools: • Eastland high (low income) • Marketplace high (high income)	~100 hours ~180 pages of field notes

(continued)

Table 2 (continued)

Level of Analysis	Data Type	Data Sources	Hours/Pages
		• Westfield middle (moderate income) • Westfield elementary (low income) • Eastland elementary (high income) • Campustown elementary (moderate income)	
	Interviews	Ten stakeholder interviews: • Three state nutrition agents • Two food service directors • Five students	~129 pages of transcripts

et al., (2004) also discussed the need to understand discursive formations and discursive practices across time, arguing that "scholars are able to track the passage of certain discourses and the closure of others," allowing us to generate alternatives to present structures (p. 198). Simply put, chronology helps discourse tracers document "what's there" as well as "what's *not* there" in order to create possibilities for change. Table 3 offers a condensed illustration of one timeline that the first author used to manage the data relating to her school meal project.

This table allowed the researcher to demonstrate the ways in which practices transform and become routinized over time, how certain policy texts might enable and/or constrain the possible discursive practices, and which voices and practices are privileged over others. It is important to note that this method of organizing data is not the same turn-by-turn sequencing used by conversation analysts. Rather, this approach recognizes that sequencing of micro discourses such as talk and text is often activated by larger discursive structures (Morales-López et al., 2005). The following task further clarifies how the chronological ordering of data can illustrate important insights about discursive practices.

Task 3: Close reading of ordered data. The next task for a discourse tracer is to conduct a close reading of the chronologically ordered data. In

Table 3
Chronological Ordering of School Meal Data

Year	List of Events
1946	National School Lunch Act instituted
2002	• *Fast Food Nation* and *Food Politics* published • Healthy Schools summit in Washington, D.C. (July 10-August 10, 2002)
2004	• Child Nutrition and WIC Reauthorization Act of 2004 (passed June 30, 2004) • Local districts have 2 years to create a local wellness policy per Child Nutrition Act
Early 2005	• Arizona House Bill 2544 (passed April 26, 2005) • Arizona schools have until January 7, 2006, to implement Arizona Nutrition Standards • Health and Nutrition Services Arizona Statewide Training (September, 2005)
Late 2005	• Period for public comments on House Bill 2544 (September 17-October 25, 2005) • Arizona Tools for Healthy Schools seminar (October, 2005) • Observations prior to implementation: Campustown elementary, Marketplace high (October, 2005) • First meeting of Eastland Wellness Policy Committee (November, 2005)
Early 2006	• Continued work/Eastland Wellness Committee (January-June, 2006) • Final Arizona Nutrition Standards released (March, 2006) • School Nutrition Association foodshow (June, 2006) • Child Nutrition Act (and local policies) implemented (January 7, 2006) • Arizona Nutrition Standards implemented (January 7, 2006)
Late 2006	Observations after implementation: • Campustown elementary (August-October, 2006) • Marketplace high (September, 2006) • Eastland elementary, Eastland high (October-November, 2006) • Westfield elementary, Westfield middle (October-November, 2006)

Note: All schools are referred to by pseudonyms. In consideration of space, this table represents a condensed illustration of the chronological ordering of data. The items in the table are all tied to field notes, transcripts, artifacts, and other texts. The chronological ordering of data can also include the more detailed ordering of specific texts and artifacts.

the case of the nutrition policy study, the first author examined the data in Table 3, to account for the ways in which national-level macro policies both enabled and constrained the development of local-level micro policy texts. For instance, the following data excerpts highlight which stakeholders should formulate and implement school nutrition policy changes (see especially the italicized words).

Macro-level text:

involves *parents, students, and representatives of the school food authority, the school board, school administrators, and the public* in the development of the school wellness policy (Child Nutrition and WIC Reauthorization Act of 2004, Section 204 of Public Law 108-265, part 5; June 30, 2004)

Mesolevel text:

The *Department* shall develop minimum nutrition standards that meet at least federal guidelines and regulations for foods and beverages sold or served on the school grounds of elementary schools, middle schools and junior high schools during the normal school day. . . . *Parents, pupils and community members* may review food and beverage contracts to ensure that food and beverages sold on elementary school, middle school and junior high school campuses provide nutritious sustenance to pupils, promote good health, help students learn, provide energy and model fit living for life. (Arizona House Bill 2544, lines 5-9, 48-52; August 11, 2005)

Micro-level talk:

It was 2002 or 2003 that [national agencies] held a big national summit called Action for Healthy Kids, and they asked key stakeholders [*like nutrition agents*] from each state to attend this national summit. . . . We came back and started our own state chapter of Action for Healthy Kids. The group decided that one of their main goals was going to be to write a model health and nutrition policy, because a lot of schools didn't have such a policy. (stakeholder interview with state nutrition agent, September 20, 2005)

Micro-level talk:

To start the first meeting, the *food service director* asked each member of the local wellness committee to introduce him/herself. Thirteen people attended the first meeting, including myself and the food service director. The remaining members included a *parent,* a *school nurse,* a *3rd grade teacher, 3 principals, 2 school board members,* a *PE teacher,* a *PE program specialist,* and an *employee benefits official.* Later in the meeting, one of the stakeholders brought up the *lack of student*s on the committee. Another member added jokingly, "Do we really want their opinions?" The food service director took a moment longer to think about her answer. "You know," she said, "I'm okay with just making the decisions." (field notes excerpt, Eastland Wellness Policy Committee meeting, October 13, 2005)

These pieces of data are just a sampling of the talk and text that addressed stakeholder participation in the changes associated with school meal policy. Macro- and meso-level texts make a clear delineation of the stakeholders with the greatest power to influence change. In the case of both the 2004 Reauthorization of the Child Nutrition Act and Arizona House Bill 2544, decision-making authority is often granted to state nutrition agencies (e.g., “the Department”). This policy move can also be traced through to micro-level instances of talk, especially when local stakeholders recognize how their actions are often shaped by larger, national initiatives. Finally, this chronological ordering of data also makes apparent those discourses that are absent, forgotten, or hidden. For example, student voices were largely absent from these discourses, especially during the formulation stages. While the Child Nutrition Act calls for students to be involved in the formulation of local wellness policies, other excerpts from the data suggest that their participation was either intentionally or unintentionally limited.

Phase 3: Analysis

The third phase of discourse tracing involves detailed strategies for data analysis. Having read over relevant literature and done a close read of chronologically ordered data in the previous phases, discourse tracers move toward two specific tasks in the analysis phase. First, they develop a series of questions they pose toward the data in order to trace out discursive practices. Second, based upon the answers of these questions, they develop a case study.

Task 1: Structured questions. The concepts of *tracing* and *structured, focused comparison* are signature moves of discourse tracing as a method. Tracing refers to the ways in which researchers follow the use of language and text across time and context. The analytic practice of tracing “can assess to what extent and how possible outcomes of a case were restricted by the choices made at decision points along the way” (George & Bennett, 2005, p. 213). Discourses enacted on micro, meso, and macro levels—and documented through the chronological ordering of data—both open up and close down the possibilities for new practices and transformations. Tracing is facilitated by the method of structured, focused comparison of somewhat parallel situations, policies, or cases. The method calls for the construction and application of structured questions to a specific case or set of subcases (George, 1979a).

Structured questions force researchers to be reflective about the questions they bring to the research study. It is important to note that these questions are different than research questions or hypotheses that might guide a research project. Rather, these questions are informed by past literature, guiding research questions, and the close reading of the chronologically ordered data. It is important to note that discourse tracers should word these questions in order to systematically "lift out" patterns and arguments from the qualitative data set. In contrast to other methods associated with grounded theory, themes from discourse tracing do not emerge from the data through repeated readings but are actively identified by a qualitative researcher using a structured, focused comparison. As such, discourse tracing emphasizes how the human instrument—as influenced by close reads of past literature, experiences gained during data collection, and the chronological ordering of that data—is implicated in drawing out qualitative observations.

Structured questions are used to trace the specific connections across cases or subcases. These questions can be purely philosophical (e.g., "What is the purpose of a policy change initiative?"), extensions from past literature (e.g., "Is the policy more paternalistic or participatory?"), and/or context-specific (e.g., "How are the points of food service organized?"). After the researcher has assembled the data in chronological order, analysis begins by asking questions that probe the data set.

Again, we refer to the first author's study of school meal programs for an example. The first author developed 30 different structured questions to the different contexts within this study. She developed these 30 questions as a reflection of the research questions and existing literature that guided this project. Other projects may require fewer or more structured questions depending on the needs of their research design. Furthermore, discourse tracers should also consider how ideas that have emerged as they have worked with participants might also shape these questions. Table 4 illustrates a brief series of structured, focused questions applied to each of the six schools where the first author observed meal programs.

As evidenced in this table, data are organized by asking questions to it. Furthermore, the process closely indicates not only the themes and data that are present but also those that may be absent and marginalized, something that is a key part of the critical interpretive process. A more specific example from the condensed data in Table 3 involves how the first author was able to follow the story of the Marketplace school district across multiple contexts. Marketplace had developed an innovative approach to their school lunch program. They offered their own version of a food court with

Table 4
Application of Structured Questions

Structured Question → School ↓	Which Stakeholders Are the Intended Audience?	Which Policies Were Applied in This School?	How Are the Points of Food Service Organized?	How Are Meanings Packaged Using Specific Word Choices?
Marketplace high	Students in Grades 9-12 (aged 14-19)	Local wellness policy	One main food court Two satellite cafeterias Vending machines	Marketplace developed a food court with six cuisines (e.g., “South of the Border” and “The Asian Line”)
Eastland high	Students in Grades 9-12 (aged 14–19)	Local wellness policy	One main cafeteria Two snack bars Vending machines	Eastland was planning to make changes inspired by the Marketplace food court
Westfield middle	Students in Grades 6-8 (aged 11-14)	• Arizona Nutrition Standards • Local wellness policy	One main cafeteria One snack bar Vending machines	Organized a weekly “food bank” with whole grain breads, fresh fruits and vegetables, and so on.
Westfield elementary	Students in Grades K-5 (aged 5-10)	• Arizona Nutrition Standards • Local wellness policy	One main cafeteria	Food service director intentionally does not label food as healthy or unhealthy
Eastland elementary	Students in Grades K-6 (aged 5-11)	• Arizona Nutrition Standards • Local wellness policy	One main cafeteria	Offers an “active and healthy” meal option each day
Campustown elementary	Students in Grades K-5 (aged 5-10)	• Arizona Nutrition Standards • Local wellness policy	One main cafeteria	Offers a “cold line” of healthy “meal packs” with salads, yogurt, and fresh fruit

Note: All schools are referred to by pseudonyms.

Mexican, Asian, Italian, and American cuisine. Marketplace's approach was often identified as a key example of how nutrition policies could inspire changes across contexts. The following pieces of data present a more detailed description of the data that the first author lifted out in response to the questions, "How are the points of service organized?," and "How are meanings packaged using specific word choices?":

> After our formal interview, both [state nutrition agents] told me to visit Marketplace high school's "food court." They mentioned that the food service director had been particularly proactive in implementing new school meal policies (field notes excerpt, state nutrition agents interview; September 20, 2005).
>
> "If you go to the food court in the mall, how many different choices do you have? Why should school lunch be any different? Kids today are so overly exposed to all of those kinds of things. If you can't meet what they're doing, then you're not gonna get anywhere. Because you have to mimic what's actually going on in the real world" (stakeholder interview, Marketplace food service supervisor; October 18, 2006).

During my last observation at Eastland high school, the cafeteria manager mentioned that the lunchroom was about to experience some changes:

> "All of this is about to go away," she said motioning to the long row of 15 windows where students could line up to purchase their chicken sandwiches, burgers, or pizza. "I guess we're getting different lines—like a Mexican line and a Chinese line," she continued. I asked her whether this was similar to Marketplace's food court. "Yeah, yeah," she responded, "I think I remember hearing something about that" (field note excerpt, Eastland high school observation; November 7, 2006).

These passages illustrate how Marketplace organized their points of service in response to larger social discourses, namely, the structuring of food at shopping centers and other contemporary social practices. At the same time, Marketplace's "Asian Line" and "South of the Border" cuisines had also inspired changes in the micro-level practices of food service at schools like Eastland high school. Thus, the application of structured, focused questions could demonstrate how policy changes and macro-level discourses both enabled and constrained new nutrition practices at Marketplace and Eastland high schools.

Task 2: Write the case study. Once discourse tracers have chronologically ordered data and applied the structured questions, their next responsibility is to translate the resulting raw data into a more accessible narrative. While the case study narrative may be singly authored by the researcher or jointly told by researcher and participant, Stake argued that the central process of writing a case study is storytelling. Just as researchers actively lifted out patterns and themes through the structured questions, writers also make choices about which story a case could and should tell. These stories are sometimes bound by the needs of participants, the demands of funding agencies, or the conventions of a journal (Stake, 2006). At the same time, many of these stories will have common elements such as narrative structure, plot, characters, and outcomes.

This task also demands a great deal of critical reflection as researchers should assess how viable their claims are, as well as how much of their own interests have been read onto a case. As such, this task is an ideal time for researchers to incorporate participant perspectives into the analysis, a practice endorsed by many participatory scholars (e.g., Heron & Reason, 1997). Including participants' perspectives in the analysis involves more than member checking, by which researchers "check" their interpretations with participants after those interpretations have been made. Rather, we encourage researchers to ask participants to read field notes, offer their own interpretations of and answers to the structured questions, and generate possible courses of action. By approaching this task with critical reflexivity and the participants' perspectives in mind, discourse tracers have more resources to account for how they arrived at their analysis.

At the end of Task 2, researchers will have a tangible product in the form of the written case study. The study of school meal programs in Arizona produced five different narratives regarding issues of language and power, using policy to promote change, and the dominant discourses that organize eating (e.g., see LeGreco, 2007). These stories were often directed at different audiences. For example, the first story addressed the relationship between paternalistic and participatory policy making. The narrative was written primarily for individuals and institutions involved in directing healthy policy and suggested that paternalistic policies might not be the most effective approach to writing food and nutrition policy. Other narratives included a list of recommendations that was written for stakeholders interested in school meal programs. Additional narratives can also be directed toward a scholarly audience, as a pedagogical tool, or for public interest.

Phase 4: Evaluating Discourse Tracing Research

Similar to any good research method, it is important to consider its evaluation. In other words, how do we judge quality in a discourse tracing project? Judging the quality of discourse tracing is connected to evaluating the implications that one can draw from a case study, as well as how those implications can be applied across contexts. Thus, discourse tracing requires that scholars account for both the theoretical and practical implications that can be drawn from a particular case or a set of cases.

Task 1: Theoretical implications. Initially, it is possible to draw theoretically rich conclusions from a single case study. The findings from a single case might not be generalizable; however, generalizability is not necessarily a criterion for evaluation with this approach. For discourse tracing, the concepts of *transferability* and *parameter setting* offer the most useful language for evaluation. Transferability has become a popular criterion for evaluation that demonstrates how individual cases create insights that are theoretically viable in other contexts (Lincoln & Guba, 1985). This concept suggests that, although findings might not be universal to all cases, some conclusions will resonate with readers in such a way that they can apply findings to other venues. Because discourse tracing is interested in examining change, power, and transformation, the implications generated by case studies could be transferred to other participants who encounter similar phenomena.

The practice of transferring our theoretical implications to broader contexts is also echoed in the use of a concept called parameter setting (Keyton, Bisel, & Ozley, 2009). With this concept, researchers are first asked to move up a level of abstraction with their findings. In doing so, we move from explaining the contextual (e.g., changing food practices through policy) to illustrating the general (e.g., using policy to enable transformation). In addition, parameter setting encourages researchers to question and critique the use of theory by making specific word choices with their implications. Contextual and applied research has the unique opportunity to illustrate when certain theories are valuable by using language. For instance, by framing findings as significant "*except for abc*" or *"especially when xyz,"* the research highlights the theories' usefulness for similar cases in which certain features and processes are present or absent.

For instance, the lunch policy case study supports an argument that paternalistic policies are useful for organizing health practices, *except for* when those practices involve food and routine eating habits. Considering that discourse tracing explicitly focuses on identifying those features and processes across micro, meso, and macro levels, the language offered by parameter setting offers a useful way to draw out implications.

Task 2: Practical implications. Alongside these resources for making theoretical evaluations, practical implications that address application are also key to evaluating the quality of discourse tracing projects. These implications may take the form of a set of recommendations about how participants can address the problems identified in Phase 1 of this research design. Because discourse tracing is interested in producing practical solutions for managing discourse and providing a window for *generative transformation* (McClellan & Deetz, 2009), Phase 4 encourages researchers to identify how research findings can be translated into information that can be directly used by study participants.

To that end, we also suggest that scholars incorporate the criterion of *human flourishing* from the participatory paradigm as testament to the success of the project. Participatory researchers note that implications and conclusions should consider how findings benefit participants directly (Heron & Reason, 1997; Reason, 1994). Similarly, discussions of phronesis (Tracy, 2007) argue that the goal of social science should be to "clarify and deliberate about the problems and risks we face and to outline how things may be done differently" (Flyvbjerg, 2001, p. 140). Thus, practical implications that outline these new courses of action could and should be an important focus of discourse tracing research. The first author worked with two different participants—a state nutrition agent and a school meal program supervisor—to craft a list of 15 recommendations for improving meal programs. These suggestions included looking for local food options and building stronger relationships between individuals and organizations who deal with school food.

Conclusion

The intention of this project is to offer a useful methodological resource for qualitative scholars—one that operates alongside rather than replaces other methodological traditions, including constant comparison, performative writing, critical ethnography, and others. More specifically, discourse tracing provides a complementary perspective to the longstanding traditions of critical discourse analysis, especially the focus on language, power, and ideology. Wodak and Meyer's (2009) review of the critical study of discourse notes the importance of a diversity of approaches, yet the authors also recognize the criticisms of those approaches that are rooted more in theoretical commitments than methodological practices. Discourse tracing not only follows the theoretical process of constituting discursive practices, it does so in a way that also prioritizes methodological transparency. Once this process understanding of discourse is accomplished through detailed tracing, the approach can then work in concert with other methodological frames. For example, Altheide (1996, 2000) used the idea of "tracking discourse" to demonstrate how public documents can be used to chart cultural shifts across different forms of media. When these two methodological resources are considered alongside one another, researchers can illustrate how policies and practices are constituted by agents with differential power. Moreover, the resulting labels, definitions, and issues can be tracked across documents, media reports, and other forms of textual representation.

In conclusion, we would like to expand upon these possible methodological resources presented by discourse tracing. First, we discuss promising contexts for which discourse tracing is particularly well suited. In addition, we anticipate some of the potential limitations of the method and open a dialogue for future methodological collaboration.

Research Questions Appropriate for Discourse Tracing

Although we are just now introducing discourse tracing as a data analysis method, we can turn to existing research studies that suggest appropriate contexts for the method. Potential research questions that could make use discourse tracing include the following:

Research question 1: In what ways do employees and organizations espouse work–life balance policies but reject them in practice over time (Kirby & Krone, 2002)?

Research question 2: How have support and resistance for same-sex marriage and unions affected the state of marriage as a traditional institution (Cherlin, 2004)?

Research question 3: How has the border patrol transformed its purpose from a focus on safety for border crossers to apprehending those who threaten national security in a post-911 society (Ackleson, 2005)?

Research question 4: What is the long-term impact of organizations' reliance on short-term or contingent workers (Gossett, 2001)?

Research question 4: How are teacher–student relationships and levels of self-disclosure transforming through the use of Internet technologies such as "Facebook" (Mazer, Murphy, & Simonds, 2007)?

Research question 5: How does relational closeness transform over various turning points? (Baxter & Bullis, 1986)?

Research question 6: What are the identity challenges faced by firefighters due to increasing reliance on firefighters for paramedic services (Tracy & Scott, 2006).

In studies being guided by research questions such as these, scholars have the opportunity to draw from multiple layers of discourse to help make sense of the situation, thereby making discourse tracing an excellent choice for analytic method. For instance, in terms of a study on firefighters' identity challenges (Tracy & Scott, 2006), researchers made use of macro discourses about sexuality and masculinity, mesolevel organizational policies that mandated firefighters' involvement in paramedic duties, and micro instances of everyday talk and practice among the firefighters that framed such work as feminine and low status. Researchers interested in the impact of same-sex marriage could draw from field note data and interview data, as well as from laws and cultural norms that discipline the marriage institution. As evidenced here, discourse tracing provides a method well suited for a variety of research projects.

Considering the Limits of Discourse Tracing Research

With the adoption of any new method or technique, qualitative researchers should have some "hesitation with respect to how we think about the spaces in which we find ourselves, how we work within these spaces, and how we might work on them" (Cheek, 2007, p. 1058). Although we believe discourse tracing offers a useful resource, we also encourage researchers and participants to employ this method with a great deal of critical reflexivity and identify its strengths and weaknesses and the contexts in which it is most and least applicable.

Throughout this article, we have set parameters for topics where this approach might be most valuable. More specifically, discourse tracing works, *especially when* the researchers and participants are interested in making sense of change and focusing on power and language. For those who are interested in examining other phenomena, such as causality or personal experience, other qualitative approaches may be more appropriate, including process tracing or autoethnography. Ultimately, the parameters of discourse tracing are set in the first task of the first phase. By defining the case and outlining the problems that participants face, researchers can best assess whether discourse tracing is a valuable method for their research.

As qualitative researchers consider ways to practice, think, speak, and write scholarship, opportunities for new and creative qualitative practices emerge. The introduction of discourse tracing as a methodological option is especially appropriate at this time. The last 10 years have witnessed qualitative, applied, and critical scholarship that celebrates more transparent displays of various research processes, reflexivity, subjectivity (Denzin &

Lincoln, 2003). Scholars will inevitably continue to question, refine, and extend the methodological resources available to us and rightly so. With this continued conversation and critique, we make the most of current methods as we enable opportunities for understanding and transformation.

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Marianne LeGreco (PhD, Arizona State University, 2007) is an assistant professor in the Department of Communication Studies at the University of North Carolina at Greensboro. Her research interests include nutrition policy and promotion, organizational communication, public health, and qualitative research methods.

Sarah J. Tracy (PhD, University of Colorado, Boulder, 2000) is an associate professor and director of the project for wellness and work-life in the Hugh Downs School of Human Communication at Arizona State University–Tempe. Her qualitative scholarly work focuses upon emotion and work-life wellness issues within organizations, particularly care work, compassion, bullying in the workplace, burnout, stress, and emotion labor.