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混合研究法セミナー報告：
社会改善を志向する変革的混合研究法
Transformative mixed methods research
for bringing positive social changes：
A graduate seminar report (Project)

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1. はじめに

本稿は、青山学院大学国際政治経済学部・国際研究センターの助成を受けて2017年8月8日(火)に開催された、「社会的公正デザインを用いた混合型研究の実施法」のセミナー報告書である。本セミナーの講師である米国ギャローデット大学名誉教授のドナ・M・マートンズ博士は、プログラム評価研究を専門とし、混合研究法専門学術雑誌 *Journal of Mixed Methods Research* (SAGE 出版) の前編集委員長でもある。聴覚障害者のために設立された米国ギャローデット大学の教授として教鞭を取るかわら、マートンズ博士は、障がい者、女性、そして人種的・民族的マイノリティといった社会的弱者のアドボカシーや人権向上を目的とする研究を行ってきた。研究参加者の有する価値観や文化を尊重し、彼（女）らが直面する課題の単なる記述に終始するのではなく、研究実践を通して課題解決を目指すことの重要性をマートンズ博士は説いてきた。そして、この目的を達成する上で、混合研究法が優れた方法論的パートナーとなることを彼女は主張している。マートンズ博士は社会的弱者の解放や人権向上を志向する混合型研究¹⁾

1) 混合研究法を用いた経験的研究のこと。

を支える哲学的視座として「変革のパラダイム (transformative paradigm)」(Mertens, 2007)を提唱した。混合研究法の「社会的公正デザイン (social justice design)」(Creswell, 2015 抱井 2017) は、研究課題に対し何らかのアクションまたは変革を志向する研究 (課題解決のために、研究者が研究対象者と協働するアクションリサーチや、地域住民と協働する地域参加型研究を含む) を質的・量的研究法の両方の研究アプローチを統合して実施する際に用いられるデザインであり、これを支える哲学的視座がマートンズ博士の変革のパラダイムである。

2時間にわたるマートンズ博士の今回のセミナーでは、前半に混合研究法および変革のパラダイムについての概説がなされ、後半では変革のパラダイムに基づいて混合型研究がどのように実施されていくかがいくつかの具体的な研究事例とともに示された。本稿では、マートンズ博士の逐語録からセミナー前半部分の内容を紹介する。ここでは、混合研究法の定義、混合研究法を支えるパラダイム、そしてマートンズ博士が提唱する変革のパラダイムの特徴が、学術論文や書籍からは知り得ることのできない博士の個人史や研究者としての経験、そして本音を織り交ぜながら語られている。多くの混合研究法第1世代がそうであったように、マートンズ博士もまた量的研究者としてそのキャリアを開始し、後に独学で質的研究アプローチを習得している。そして、質的研究者と量的研究者間のパラダイム論争²⁾を目の当たりにし、これを不毛と感じた上で混合研究法を自身の方法論的パートナーと定めるに至っている。

社会的弱者を対象とする研究を実施する際に、研究者と研究参加者の関係が主体と客体の二元論的關係にあっては、問題の「記述」はある程度可能でも、状況に対しより良い「変化」をもたらすことはできないだろう。この点にマートンズ博士が混合研究法 (特に質的研究の貢献) を評価する最大の理由がある。つまり、変革を志向する研究においては、研究者が研究参加者の視点から問題の本質を見極めない限り、真に意味のある変革をもたらすことはできないという考えがここにはある。マートンズ博士は、ポスト実証主義に依拠し、量的研究を用いて対象を調査することを”research on people”と表現し、これに対し、自身が提唱する変革のパラダイムに依拠し、混合研究法を用いて調査を実施することを”research with people”と表現している。言語表現にすれば”on”と”with”の前置詞の違いを有する研究に対するこれら2つの向き合い方は、研究者が実在のあり方をどのように捉え (存在論)、どのような知識にアクセス可能であり (認

2) 主に北米において、1980年代を中心に量的研究者と質的研究者の間で展開した、社会・行動科学研究におけるそれぞれの研究アプローチの優位性をめぐる論争。量的研究と質的研究は依って立つ存在論的・認識論的前提が異なることから、2つの研究アプローチを単一の研究プロジェクトにおいて共に用いることはできないという主張がなされた (抱井, 2015)。

識論), どのように知識を構築するか(方法論)といった次元において, 大きく異なる(Guba & Lincoln, 1994)。そして何よりも, ポスト実証主義が研究における客観性・価値中立性の前提を採る一方で, 変革のパラダイムが弱者に寄り添いながら、彼らの生きやすい社会を構築するために研究を行うという価値負荷的な前提を採る点において, 両者は一線を画すものとなっている。

マートンズ博士は, 私たちに多くの重要な問いを投げかける。社会的弱者や社会的マイノリティが置かれた状況や直面する課題を, 客観的立場で距離を置いたところから正確に記述することは可能なのか。そのような場所から導き出される課題解決のための提案は, 外部者のエティックな視点から生まれたものであり, 社会的に周縁に追いやられた人々の状況の改善をもたらす政策に必ずしも結びつくとは限らないのではないか。長年にわたりプログラム評価研究者としてのキャリアを蓄積する中でマートンズ博士が導き出した結論は, 望ましい変化をもたらす政策は, 当事者のイーミックな視点が不在では生み出すことができないということである。そして, 博士のこの確信が, 混合研究法を支える哲学的基盤としての変革のパラダイムを誕生させる原動力となった。混合研究法は, 研究参加者の当事者としてのイーミックな視点と, 研究者の科学者としてのエティックな視点を統合することによって, 単一の方法のみではなし得ない, 現象の包括的な姿を浮き彫りにすることを可能にする。混合研究法が有するこの性質を最大限に利用して, より良い社会の構築に研究を通して貢献しようというのが, マートンズ博士が提唱する変革のパラダイムの核心であり, このパラダイムの最大の特徴である価値負荷性の現れである。

本稿ではマートンズ博士の講演録の前半部分を紹介する。博士の講演はその内容によって抱井が下記の6つのセクションに分けている。なお, 特に重要と思われるキーワードは太字にし, ポイントとなる箇所には下線を引いている。

- 1) Becoming a Mixed Methods Researcher
- 2) Working with People from Marginalized Communities
- 3) Definitions and Paradigms of Mixed Methods Research
- 4) Applying the Transformative Perspective to the Japanese Context
- 5) Paradigms Supporting Mixed Methods Research
- 6) The Essence of Transformative Paradigm

2. 変革的混合研究法とは－マートンズ博士によるセミナー逐語録から－

Speaker: Dr. Donna M. Mertens

1) Becoming a Mixed Methods Researcher

Hello, it is very nice to be here. Thank you very much for inviting me and thank you to Hisako for her kindness and support, coming to see me last night when I first got here, so I knew I was in the right place and someone was taking care of me. I want to just tell you that, I will be talking about the title, obviously mixed methods research, and focusing on design and research using mixed methods. And then that part, this is for transformative purposes, indicates that in the way that I look at research: I want it to be used for social change; I want it to be used to improve human rights; I want it to be used to improve social justice. That is where I am coming from. I will be getting into the **transformative paradigm** in the various assumptions that are associated with that. If I say something and you are very perplexed, I would be very welcoming to have you just raise your hand and ask a question for clarification. And then at the end, I would like to leave some time for discussion, and your response, your reaction, your thoughts to what I presented. So if there are things that occur to you, just take a little note and that way you will be ready, so we can have some discussion at the end.

So, I thought it might be good to just start with talking with you for a few minutes about how I came to situate myself in the world of mixed methods, because in some ways it is an approach to research that has been used for a long time. In another way, it is an approach to research that has only really come into its consciousness in a short period of time. And so, in my graduate work, I was trained completely in quantitative methods. I had my undergraduate degree in psychology and my graduate degrees were both in educational psychology and I took research designs, quantitative statistics first semester after semester after semester and survey design, and everything was quantitative. I actually started my research work at the college of medicine at the University of Kentucky, looking at who was accepted into the medical school and what kind of qualifications they had, and used some very sophisticated regression analysis to figure out what the qualities were to predict

success. And not surprisingly, the qualities, the variables that came out most significant were, their undergraduate degree in science, their grade point average in science, and then their medical school entrance exam in science. And so that was actually in 1972. And at that time I wrote an article saying, “Okay, we have this quantitative data and it is telling this one thing, but is that the only quality we want in a doctor, someone who knows science? Do I want a qualified doctor that knows science? Yes! But is that the only quality that we should be looking for in basing our decisions?” So you can see, even at that point, even though I have been raised very quantitatively, I was already struggling with the idea that we are not getting the whole picture here, and maybe we should be looking at the social factors that are leading us to accept these scientists who mostly were white able-body males at the time. And that maybe, they needed to look at the implications of changing criteria for accepting people who might have more of a humanitarian approach to medicine, people who came from different cultural groups and women. And so I think, even at that point, it was just the beginnings of my consciousness that the conduct of research requires us to go beyond just the data that we get, whether it is quantitative or qualitative.

From there, I went to work for what was called the Appalachian Regional Commission and the Appalachian Mountains are those in the United States that stretch along the East Coast that go from New York down to Alabama - an area of high poverty and they are isolated. So once you get into the mountains, there is less access to education of quality, less access to professional development opportunities for people who provide services there. And so that was the kind of work that I was doing. Initially I was doing surveys to find out what kinds of things people needed there and then surveys to find out if the programs we were doing were providing benefit. And as I would look at the data and then I would go visit the areas, I think there is a disconnect. Yes, I have this data that is numbers, but I am not getting that sense of what it means to have those kinds of needs in the context and what it means to have programs provided and how that is changing or not changing because it is not reaching; it doesn't have the relevance that it needs to have. And in order to really capture that and for me to do good research, I was looking at my research saying, “There is just significant limitations here.” Then I felt that I really had to

learn the qualitative skills.

Why did not I learn qualitative skills in graduate school? They did not teach it. When I was in graduate school, they did not teach it. So I actually have the opportunity to work with Yvonna Lincoln and with Egon Guba³⁾ during the very early days when they were introducing qualitative methods, and people were talking about the **paradigm wars** and people who did quantitative work were saying, “There was something wrong with people who did qualitative work” and vice-a-versa, and sometimes it got kind of ugly. But for me, it was like, “Why don’t we put these two together? Why are we having this war? Why don’t we say there is value in different kinds of data and each one is going to bring us to a closer understanding of the complexity of things that we are working with?” And so that really was the trajectory for me to say, “Hey, I need both of these kinds of data, I am going to learn the skills.” And at that point, there still wasn’t something called the **Mixed Methods International Research Association**⁴⁾ because that didn’t come around until like four years ago!

2) Working with People from Marginalized Communities

I’ll tell you how I was drawn towards working with members of marginalized communities. I was raised in a family with 12 children and we were poor, but my dad had a good job and my mom worked 24 x 7 raising children, growing the garden, making the clothes; she never got a break. And so, even though, we were poor at the beginning, but then we became really middle-class. And I was healthy and I was doing well in school, so those were my markers of privilege and I did not have to struggle to get a good education. It was there and I was good at it and I could do it. But I would look around and I would see people either because they did not have that kind of support from home or they had a different language or maybe they had some kind of disability, and I would say, “Well, some people are going to make it anyway no matter what we do, but some people are not. And so how can we

3) 教育評価研究の専門家。20世紀中盤まで社会科学研究において支配的であった実証主義に基づく量的研究アプローチに代わるものとして、質的研究アプローチによる自然主義的探究 (naturalistic inquiry) (Lincoln & Guba, 1985) を提唱した。

4) 国際混合研究法学会。2014年に第1回の大会を米国ボストン大学で開催している。

contribute to the improvement of the quality of life for people who are experiencing that kind of marginalization?” And so from that, I said, “Well, I am going to do research that looks at the experience of people from marginalized communities,” and I did it with Ohio State University. At that point, they told me I could only use quantitative data. And so I was removed from the people that I was doing the research on. I was doing research on people, not with people. And I was doing it on, like women in the workforce or people with disabilities or people in isolated rural areas or other marginalized populations. And it was for the purpose of informing policy for the United States Congress. Now just think about that, I was removed from those populations because I was just doing numbers that I got from big databases and I was informing policy decisions. When I think about it now, I kind of get goose bumps and think, “Oh gosh, there could have been so much more that could have been said.” And so, I looked around for places I could go where I could actually get immersed in a community, and learn the culture and learn the context of people who experience marginalization so that I could work with, instead of on.

Then I found an advertisement in the newspaper to teach research at Gallaudet University, which is the only university in the world that is only for deaf people. And at that point, I had never met a deaf person, so I did not know anything about it but I thought, let me just try and it was really an experiment. It is like saying, they are a marginalized community, I want to try to enter the marginalized community and figure out what that means respectfully. And of course, they said, “You have to learn sign language, American Sign Language, and deaf culture.” So, that was a big challenge. And then I thought, “Well, I can work at that; I am strong and I am smart and I can work at that.” And I start lecturing about my research because I knew research. But they would look at me and say, “That has nothing to do with this. All the things you are telling us about methods, that has nothing to do with, our lives.” And so it became more of an exchange of “What are you experiencing? What would make sense from your perspective to do research?” And that is where the transformative paradigm came from. So, that was kind of an interaction between my level of knowledge about methodology and their level of knowledge about the meaning of being a member of a marginalized community and how we could learn from each other.

Deaf people had patience and willingness to open up and share, and we could really learn together how to develop an approach to research that would be responsive to these kind of issues. And while I developed it in conjunction with that as my home base, it turns out that the issues regarding the experience of marginalization are commonly experienced by people across the globe for various reasons. So I look upon it as what dimensions of diversity are relevant within a particular context, what dimensions of diversity are being used as a basis of discrimination and oppression within that context, and how does a transformative paradigm then inform thinking about how to approach research when you are working with the marginalized population. So I don't make the claim that I know how to do research in marginalized communities across the globe. What I do make the claim is that, I have given a lot of thought to this and I have worked with a lot of different communities who have said, "That makes sense to us." We cannot just take what you say and apply it like a cookbook, and for that I am grateful because that research shouldn't be approached as a cookbook. It is a thinking person's exercise and we need to have that scholarly base, but we also need to be responsive to the things that we are learning. And so that was really, how I came to mixed methods research.

3) Definitions and Paradigms of Mixed Methods Research

Okay, now that you have kind of a context from where and how I came to do mixed methods, I am going to talk about our definition of mixed methods – what it means and how it has been talked about in the scholarly world, and paradigms that are functioning to help us understand the use of the mixed methods. And then I am going to talk about **transformative mixed methods** and how they are used to research the effectiveness of programs and also how they are used in policy research. So those two applications. I am going to touch on some of the things that might be relevant in Japan, challenges in Japan. And I am going to ask you to think about what those challenges are and how you could envision mixed methods being used to address those challenges. So again, I am not claiming to have expertise about what the challenges are and how to do research in Japan, but I will share with you this framework and I will ask you to think and to share what you think would work for you and what would be relevant within this context.

So when we say mixed methods, what is it that we are talking about? The simplest part of looking at mixed methods would be to say, well it means you collect and analyze both quantitative and qualitative data. Okay so, having been the editor of the *Journal of Mixed Methods Research* for five years, I am not the editor anymore, Michael Fetters is, along with José Molina-Azorin. But I was for five years and we would get manuscript sometimes without quantitative and qualitative data included and so we would just say, "It doesn't make the definition, so maybe you will find another journal that is a better place for you to publish." But the second quality that is listed there is **the integration of that data** at various levels and stages of the study, so it says you are going to collect both kinds of data, but they are not going to be kept on separate tracks. There have to be some points where they integrate with each other, where your understanding of concepts is informed by bringing quantitative and qualitative data together. So, the integration part is really crucial. And it can be done in a single study; it can be done in a sequence of studies. So you might have one study that starts out quantitative, but it leads to a study where you are doing more qualitative data collection that is informed by what you did in the first stage of the study. And you can be **methodologically eclectic**; it doesn't mean just surveys and focus groups; any kind of methodologies that you learn about in your quantitative research and your qualitative research can be brought into the context of mixed methods.

And as we see the sophistication of designs improving, then I think we are able to see more of that final point that is there, **the synergy between the qualitative and quantitative**, because it means that there is something different happening because you were able to bring both types of data together. You are not just getting an understanding from quantitative and qualitative, but you are getting something that is richer, that can lead to a better understanding, that can lead to recommendations, and that can lead to action. And so if you work with that definition of mixed methods, you are sharing the definition that the mixed methods community right now is working with.

So when I talk about quantitative and qualitative, as I said it is eclectic. You can talk

about experimental, quasi-experimental, quasi-comparative, correlational surveys. Single case designs are based on the collection of quantitative data. Qualitative, yes focus groups – I worked with indigenous communities and they have their own qualitative approaches to group processes. You can do case studies, ethnographic research, phenomenological research, participatory action research, ethnomethodology, discourse analysis, any kinds of qualitative methods can be brought into a mixed methods study. And then my experience has led me to this third statement here, that mixed methods are most likely to be the appropriate choice because of the need to integrate community perspectives into the inquiry process, thus necessitating collection of qualitative data during the research or evaluation process. So if we are working with communities and we are trying to understand multiple perspectives, I think it may be possible to do transformative research with only quantitative data, but I have never been able to do it. I have to have qualitative data, at least in the form of interaction with members of communities, looked upon as opportunities for the collection of qualitative data.

4) Applying the Transformative Perspective to the Japanese Context

Now bringing in the perspective of equity and gender responsive, transformative mixed methods research, why do I bring this in? Well, my understanding of some of the issues that arise in Japan is that there is concern about the nature of relationships between men and women and sexual minorities, that the nature of those relationships are influx that there are some consequences that are being experienced, that a lack of traditionally being egalitarian in those relationships is leading to later marriage, no marriage or not having children, which is having economic consequences for the country of bringing in more foreign workers. And even today in the newspaper, I pick up the newspaper and International Monetary Fund says Japan should have more foreign workers and they should get more women in the labor force, actually even get old people in labor force. These are very contemporary issues. And so there is an interconnection of the culture that is defining relationships and the consequences of this relationship more broadly. And so I bring up these notions of equity and gender responsiveness, and what it means to bring those into the research process. What it does is it asks us to look at those structural causes of inequities through an analysis of power relationships, through an analysis of social norms, and

through an analysis of cultural beliefs.

And so I ask you to start thinking about the Japanese context and what that means, – What is the nature of power relationships between the genders? What are the social norms that are guiding behavior choices? What are the cultural beliefs that are relevant within that context? And then start thinking about, well with mixed methods research, how can we provide evidence-based learning on how policies and programs deliver results and what needs to be done more efficiently and more effectively. So how can mixed methods research be brought into the culture of Japan to address gender inequalities to support workers and families who come from outside of Japan and people with disabilities and sexual minorities? These to me were salient challenges that would fit very well within a transformative perspective.

Now what I am going to do is to talk about **the sensitivity of dealing with these issues** and as researchers how we need to be cognizant of that sensitivity. And a way of doing that for me is to talk about the work that I have done with the Centers for Disease Control and Prevention (CDC), one of the major funders for health research in the United States. They have started a major initiative to prevent violence against women, but not only just to prevent violence against women but to prevent rape. And so they have this initiative that is national, where every state health department is getting funding. Who knows if they'll keep that funding now that we have a new president, but there is an initiative to stop rape. And if you think about the programs that have in the past been used to prevent violence against women, for a large part, they redirected at women. And they will say, "Well women don't dress provocatively; women don't drink alcohol; women don't go out alone at night." But then the CDC said, "It is actually the men that are raping the women, and so maybe we should work with the men." Radical! And so I show you this slide with the little cartoon with the fellow saying, "Let me know when you look at me again with that being me reminded of the sins of my gender." So when we are talking about rape, it gets uncomfortable, right? And we say we are going to work with the men and it gets uncomfortable. And so the transformative paradigm brings us to the point of saying, "We have to talk about things that are uncomfortable; otherwise, we are not going to see change. But we also have to do it with sensitivity and with an understanding

of how that concept is understood in order to bring it to visibility that doesn't create defensiveness but creates a willingness for change." It is a tall order... How do we do that?

So, what I am going to ask you to do is to think about your own research interest area. I have only had a chance to speak with a couple of you, and as we go through this, think about your interest area and what your training has been in methodology, and if you have been quantitatively and qualitatively trained, if you have had mixed methods opportunities, and what is your interest in working with marginalized populations. It is not something that everybody makes the choice to do, but the Japan Society for Mixed Methods Research⁵⁾ is having its meeting in Osaka in a couple of days and the theme of the meeting is "transformation." And so this is what Hisako invited me to talk about, and so I invite you to play with those ideas within the context that you do your research. Where does transformative ideas come into play?

5) Paradigms Supporting Mixed Methods Research

Okay. So I said that I will be talking about paradigms. This structure of paradigms that I am using is based on the work of Lincoln and Guba and they were talking about the structure of paradigms as being made up of four types of philosophical assumptions. It really came about for me because of being trained in quantitative and then learning qualitative and having the paradigm wars going on and then having feminist say, "Oh, you have to do qualitative work," and I am like, "Is it only qualitative work that feminists can do?" So I was looking for a paradigm that allowed me to do this transformative kind of work, that crossed over from **the positivist** and **the constructivist** and said, "Where is the ground where we can talk to each other? Where is the ground where we can do work together?" And this notion of paradigm helped me sort through that. And so I will be talking about **the axiological assumption** associated with the transformative paradigm. So what does ethics mean if we are working from a transformative stance? **Ontologically**, what is the nature of reality from a transformative stance? And **epistemologically**, what is the nature of knowledge and the relationship between the researcher and the participants and the

5) 日本混合研究法学会 <http://www.jsmmr.org/>

research study? And **methodologically**, what does that mean that we do methodologically?

And to give you a picture of where this fits at the present time according to me and other scholars, there are four paradigms that are being used as a basis for making the claim that we can do mixed methods research. And I like to think of it as **the anti-paradigm war or the anti-war paradigm**, that we can use mixed methods without having contention and argument that gets vicious. We can have civilized conversation across paradigms and find paradigms that allow us to do both quantitative and qualitative and find the space of comfort in them. And so we are looking at now **the pragmatic paradigm**, which if you are familiar with John Creswell's work and Abbas Tashakkori, people like that are writing a lot about the pragmatic paradigm and their work is situated within that. The post-positivist paradigm, we are seeing people who are writing about mixed methods designs that are dominantly quantitative, but they see the benefit of the use of qualitative data in a subservient role, but within the post-positivist paradigm. The constructivist, more along Lincoln and Guba and Norm Denzin, are saying, "Yes, you can have quantitative data in a qualitative study, but it will be dominantly qualitative, your work from the constructivist assumptions with the inclusion of quantitative data as well.

And then the transformative paradigm, which I will be going into a lot of detail about, is looking at how we bring mixed methods to understand the cultural context, power dimensions and so forth in order to have a study that contributes to transformative change. And then we have the work of people like **Burke Johnson⁶⁾** and **Jennifer Greene⁷⁾**, who are talking about **dialectical pluralism** where they are saying, "Well

6) 混合研究法を哲学的視座から考察し、多くの論考を世に送り出している。2015年に開催された「混合研究法国際シンポジウム@青学」にも登壇者の一人として参加している。混合研究法を用いる姿勢として Jennifer Greene が提唱した弁証法的スタンス (dialectic stance) (Greene, 2007) を、弁証法的多元主義 (dialectical pluralism) という哲学に近年発展させている (Johnson, 2017)。

7) 教育評価研究を専門とし、混合研究法草創期から今に至るまで、もっとも影響力のある研究者の一人といえる。混合型研究を実施する目的を類型化した Greene らによる論文 (Greene, Caracelli, & Graham, 1989) は、混合研究法の古典的論文として位置づけられている。彼女の提唱した弁証法的スタンス (Greene, 2007) は、量的・質的研究の結果に矛盾が見られる時、

you could pick two paradigms and just have a research team that does one paradigm and research team that does the other paradigm and then put them in conversation with each other.” So that is the dialectical conversation, pluralism with each other. Okay, so I have arguments with Burke, just civilized arguments, because I tell him it would make me feel schizophrenic to try, accept these, sticking with these assumptions and then sticking with these assumptions, I cannot do it myself. That is why I say, “Well I have to go to the transformative paradigm because it allows to me to have assumptions that I can work with.” That is what paradigms are. They are sets of assumptions that define your worldview. How do you view ethics? How do you view reality? How did that inform your choices of methodology? So I think mixed methods helps us get beyond those wars into civil conversation, that how we can use quantitative and qualitative data to do better research.

6) The Essence of Transformative Paradigm

So, we are going to talk about the transformative paradigm. And just as an overview, we'll be looking at the meaning of ethics, the axiological assumption. It starts with cultural respect. In order to do research that has a hope of creating change or contributing to positive change, there needs to be an understanding of culture and a respect for culture. So if we go back to the example of rape prevention education, we would go back to what is the culture that surrounds that, and what is the meaning of masculinity in that culture. And it is not monolithic; there are varieties of perspectives on the meaning of masculinity. And so we would want to interrogate that to say, “What definitions are we moving now more into the ontological, the variety of versions of reality? Are there definitions of masculinity that lead to egalitarian relationships, respectful relationship? Are there definitions of masculinity that would be more oppressive and that might be contributors to the occurrence of rape and violence?” And so we would want to understand the cultures that surround the concepts of importance within the study that we are conducting.

The second part of ethics is the promotion of social justice and human rights, and you have heard me talk about that since the moment I opened my mouth. My hypothesis

そこから新たな知識発見やリサーチエスションが生まれると考える。

is, if we don't say our study is going to address social justice and human rights, it probably won't. If we do say it, we have a better chance of actually bringing that into the conversation about how we are going to collect data, who we are going to collect it from, how we are going to share it, what is going to be done with that data. And so for me, it is really important to put that upfront and say for my study to be ethical, I need to be including the meaning of human rights and social justice at the very beginning and let that inform my methodology.

And then **the addressing of inequities** that says, everybody here is not getting treated the same- What is the basis of discrimination within the context that you are working? And then very importantly the notion of reciprocity- What do we give back to communities when we do research with them? And this came home to me so strongly with both the deaf community and indigenous communities who said, "It is not that we are opposed to research; we are just opposed to research that comes in and either just tells us one more time how terrible everything is for us, or tells us that there is something wrong with us, or inaccurately portrays what is going on with us, and then the researcher leaves and nothing gets better." So here the reciprocity is being seen as capacity building, leaving people better off as a result of having participated in the research. Sometimes in the United States when we do research we say, "Yes we are going to give something to the people who are participants in our research; we are going to give them a coupon that they can take to a bookstore, or we are going to give them a pizza, or we are going to give them something, that would define this reciprocity." But I think, we are looking at from a transformative perspective, we don't want to just give them something material, but something that they can actually have grown and understand better and are in a position to continue to advocate for improvement in their own communities. And if we are going to do that, we have to change the way we design our research, because it has to include that.

So when we get to **ontology, the nature of reality**, for me this was a big struggle of how to really understand it from a transformative perspective and here is how I came down to understand it. I said we have lots of versions of reality out there. Just as I said about the meaning of masculinity as an example, we have lots of versions of

reality and what that means, but those versions of reality come from different places. They come from positions of privilege or not privilege; they come from different socio-economic statuses; they come from different racial-ethnic groups; they come from immigrant refugee status; they come from disability and deafness. So trying to understand where those different versions of reality come from is a part of the research process. And the other part of it is looking at the consequences of accepting one version of reality over another. Suppose you had a leader of your country who says, "Yes, I am in the powerful position, and I can go in and I can grab women because I am powerful." That is a version of reality. But what are the consequences of accepting that version of reality? The version of reality that says that is okay versus a version of reality that says, "Women should be respected; there should be mutual respect between men and women and not a domination and not behaviors that are invasive of your privacy and your personal space and your rights."

So looking at which version of reality is going to move us closer to social justice and how we move towards the broader acceptance of that version of reality versus one that is going to continue an oppressive status quo... Hisako was just telling me about how terrible it would be to ride a train in Japan as a woman. And not that it is perfect now, but there has been improvement. And that was a cultural shift. That was looking at a version of reality that said, "It is okay, you are in a train, I am a man, I can grab you" to saying, "No, that is not okay." That is a version of reality that is not okay, and we need a policy change and we need enforcement of that policy. That is a cultural shift. How did that come about? And what other kind of cultural shifts are needed? How do we move from beliefs that are present to beliefs that are constructive and that move us towards more justice?

And epistemologically, how do we interact with the people in our studies? Like when I was raised post-positivist, I was told, "Don't you get involved with those people; you should be objective; you should be neutral; you should not get close or involved because you are going to be biased." But my experience tells me something different. If I work only from a distance, I could be operating for my own personal unexamined biases that have never been challenged by the people that I am studying, and it is not until you actually come into interaction and build relationship that your personal

biases can become something that you are cognizant of. It is something that could be challenged. In my case, many relationships with deaf people that I came to understand their experiences and what needed to shift for them to have more access in the broader society, more respect as a human being.

And so it is that ability to develop a trust because people are sharing things with you that are personal and that might be painful. If we are going to really address these difficult issues, they can be very painful. And why should people trust you with that kind of information unless you have spent the time and you go back up to that axiological assumption to learn their culture and learn the power dynamics within that community and learn how to be respectful, and then you have the opportunity to build trust. And so I would argue, yes you can go ahead and collect your quantitative data, but you don't really know how the people in the community are interpreting your quantitative scales unless you have had that interactive process where the assumptions you make are challenged and there is a cooperative effort to create daily collection methods that are viewed as legitimate and valid by the people you are collecting the data from.

So, methodologically where does that take us? I would say to a transformative lens that we apply to the methodologies. It takes us to the need to have dialogue on multiple levels with multiple constituencies in order to really be able to know how to move forward. And in my experience, it leaves us to mixed methods.

3. むすび

本稿では、マートンズ博士のセミナー講演録から、彼女の個人史を絡めながら語られた変革的混合研究法誕生の経緯と、変革のパラダイムに支えられた研究実践に関する講義を紹介した。そこには、日本社会が現在抱えるジェンダー格差問題や、外国人労働者・性的マイノリティの社会的統合の課題を解決するための変革的混合型研究への示唆も含まれていた。

マートンズ博士の講義録から特に印象的であったのは、研究参加者の経験を当事者の視点から理解することなしに量的データを解釈することの危うさや、社会的弱者が抱える問題を明らかにするだけでは当事者にとって益はなく、研究結果を問題解決に繋げて

こそ初めて真に価値のある研究に成り得るという点である。リサーチの経験を積むなかでマートンズ博士がこれらの学びを得てきたことがセミナー講義録から生き生きと伝わってくる。博士はまた、講義の中で、”reciprocity”（互恵性）という概念に幾度も触れている。これは研究者と研究参加者の互恵的関係を指し、時間を割いて貴重な情報を提供してくれる研究参加者の労に報いるためにも、研究者は研究参加者の状況改善に資するリサーチを行うべきであるという博士の信念の表れである。そしてマートンズ博士のこの信念が、変革のパラダイムを誕生させたというわけである。

マートンズ博士による変革のパラダイムは、今日、社会改善・社会変革を目指して混合研究法を用いた参加型アクションリサーチを実施する世界中の研究者によって哲学的視座として採用されている。本稿を通じて、一人でも多くの日本の研究者に博士の変革的混合研究法に触れていただければ幸いである。

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