

# The Purpose Statement

The last section of an introduction, as mentioned in Chapter 5, is to present a **purpose statement** that establishes the intent of the entire research study. It is the most important statement in the entire study, and it needs to be clear, specific, and informative. From it, all other aspects of the research follow, and readers will be lost unless it is carefully drafted. In journal articles, researchers write the purpose statement into introductions as the final statement; in theses and dissertations, it often stands as a separate section.

In this chapter devoted exclusively to the purpose statement, I address the reasons for developing it, key principles to use in its design, and examples of good models in crafting one for your proposal.

## SIGNIFICANCE AND MEANING OF A PURPOSE STATEMENT

According to Locke, Spirduso, and Silverman (2013), the purpose statement indicates why you want to do the study and what you intend to accomplish. Unfortunately, proposal-writing texts give little attention to the purpose statement, and writers on method often incorporate it into discussions about other topics, such as specifying research questions or hypotheses. Wilkinson (1991), for example, refers to it within the context of the research question and objective. Other authors frame it as an aspect of the research problem (Castetter & Heisler, 1977). Closely examining their discussions, however, indicates that they both refer to the purpose statement as the central, controlling idea in a study.

This passage is called the purpose statement because it conveys the overall intent of a proposed study in a sentence or several sentences. In proposals, researchers need to distinguish clearly between the purpose statement, the research problem, and the research questions. The purpose statement sets forth the intent of the study, not the problem or issue leading to a need for the study (see Chapter 5). The purpose is also not the research questions—those questions that the data collection will attempt to answer (discussed in Chapter 7). Instead and again, the purpose statement sets the objectives, the intent, or the major idea of a proposal or a study. This idea builds on a need (the problem) and is refined into specific questions (the research questions).

Given the importance of the purpose statement, it is helpful to set it apart from other aspects of the proposal or study and to frame it as a single sentence or paragraph that readers can identify easily. Although qualitative, quantitative, and mixed methods purpose statements share similar topics, each is identified in the following paragraphs and illustrated with fill-in scripts for constructing a thorough but manageable purpose statement.

### A Qualitative Purpose Statement

Good **qualitative purpose statements** contain information about the **central phenomenon** explored in the study, the participants in the study, and the research site. It also conveys an emerging design and uses research words drawn from the language of qualitative inquiry (Schwandt, 2007). Thus, one might consider several basic design features for writing this statement:

- Use words such as *purpose*, *intent*, or *objective* to signal attention to this statement as the central controlling idea. Set the statement off as a separate sentence or paragraph, and use the language of research, such as “The purpose (or intent or objective) of this study is (was) (will be) ...” Researchers often use the present or past verb tense in journal articles and dissertations and the future tense in proposals because researchers are presenting a proposal for a study not yet undertaken.

- Focus on a single phenomenon (or concept or idea). Narrow the study to one idea to be explored or understood. This focus means that a purpose does not convey relating two or more variables or comparing two or more groups, as is typically found in quantitative research. Instead, advance a single phenomenon, recognizing that the study may evolve into an exploration of relationships or comparisons among ideas. None of these related explorations could be anticipated at the beginning. For example, a project might begin by exploring teacher identity and the marginalization of this identity in a particular school (Trubie & Whelan, 1999), the meaning of baseball culture in a study of the work and talk

• Use action verbs to convey how learning will take place. Action verbs and phrases, such as, *understand*, *develop*, *explore*, *examine the meaning of*, or *discover*, keep the inquiry open and convey an emerging design.

• Use neutral words and phrases—nondirectional language—such as, exploring the “self-expression experiences of individuals” rather than the “*successful* self-expression of individuals.” Other words and phrases that may be problematic include *useful*, *positive*, and *informing*—all words that suggest an outcome that may or may not occur. McCracken (1988) referred to the need in qualitative interviews to let the respondent describe his or her experience. Interviewers (or purpose statement writers) can easily violate the “law of nondirection” (McCracken, 1988, p. 21) in qualitative research by using words that suggest a directional orientation.

• Provide a general working definition of the central phenomenon or idea, especially if the phenomenon is a term that is not typically understood by a broad audience. Consistent with the rhetoric of qualitative research, this definition is not rigid and set but tentative and evolving throughout a study based on information from participants. Hence, a writer might say, “A tentative definition at this time for \_\_\_\_\_ (central phenomenon) is ...” It should also be noted that this definition is not to be confused with the detailed definition of terms section as discussed in Chapter 2 on the review of the literature. The intent here is to convey to readers at an early stage in a proposal or research study a general sense of the central phenomenon so that they can better understand the types of questions and responses asked of participants and data sources.

• Include words denoting the strategy of inquiry to be used in data collection, analysis, and the process of research, such as whether the study will use an ethnographic, grounded theory, case study, phenomenological, narrative approach, or some other strategy.

• Mention the participants in the study, such as one or more individuals, a group of people, or an entire organization.

• Identify the site for the research, such as homes, classrooms, organizations, programs, or events. Describe this site in enough detail so that the reader knows exactly where a study will take place.

• As a final thought in the purpose statement, include some language that delimits the scope of participation or research sites in the study. For example, the study may be limited to women only or Latinas only. The research site may be limited to one metropolitan city or to one small geographic area. The central phenomenon may be limited to individuals in business organizations who participate in creative teams. These delimitations help to further define the parameters of the research study.

Although considerable variation exists in the inclusion of these points in purpose statements, a good dissertation or thesis proposal should contain many of them.

To assist you, here is a **script** that should be helpful in drafting a complete statement. A script, as used in this book, contains the major words and ideas of a statement and provides space for the researcher to insert information.

The purpose of this \_\_\_\_\_ (strategy of inquiry, such as ethnography, case study, or other type) study is (was? will be?) to \_\_\_\_\_ (understand? explore? develop? discover?) the \_\_\_\_\_ (central phenomenon being studied) for \_\_\_\_\_ (the participants, such as the individual, groups, organization) at \_\_\_\_\_ (research site). At this stage in the research, the \_\_\_\_\_ (central phenomenon being studied) will be generally defined as \_\_\_\_\_ (provide a general definition).

The following examples may not illustrate perfectly all the elements of this script, but they represent adequate models to study and emulate.

#### Example 6.1 A Purpose Statement in a Qualitative Phenomenology Study

Lauterbach (1993) studied five women who had each lost a baby in late pregnancy and their memories and experiences of this loss. Her purpose statement was as follows:

The phenomenological inquiry, as part of uncovering meaning, articulated “essences” of meaning in mothers’ lived experiences when their wished-for babies died. Using the lens of the feminist perspective, the focus was on

MOthers' MEMORIES AND THEM LIVING THROUGH EXPERIENCE. THIS PERSPECTIVE FACILITATED BREAKING THROUGH THE silence surrounding mothers' experiences; it assisted in articulating and amplifying mothers' memories and their stories of loss. Methods of inquiry included phenomenological reflection on data elicited by existential investigation of mothers' experiences, and investigation of the phenomenon in the creative arts. (p. 134)

I found Lauterbach's (1993) purpose statement in the opening section of the journal article under the heading "Aim of Study." Thus, the heading calls attention to this statement. "Mothers' lived experiences" would be the central phenomenon, the key being explored in a qualitative study, and the author uses the action word *portray* to discuss the *meaning* (a neutral word) of these experiences. The author further defined what experiences were examined when she identifies "memories" and "lived through" experiences. Throughout this passage, it is clear that Lauterbach used the strategy of phenomenology. Also, the passage conveys that the participants were mothers, and later in the article, the reader learns that the author interviewed a convenience sample of five mothers, each of whom had experienced a perinatal death of a child in her home.

#### Example 6.2 A Purpose Statement in a Case Study

Kos (1991) conducted a multiple case study of perceptions of reading-disabled middle school students concerning factors that prevented these students from progressing in their reading development. Her purpose statement read as follows:

The purpose of this study was to explore affective, social, and educational factors that may have contributed to the development of reading disabilities in four adolescents. The study also sought explanation as to why students' reading disabilities persisted despite years of instruction. This was not an intervention study and, although some students may have improved their reading, reading improvement was not the focus of the study. (pp. 876-877)

Notice Kos's (1991) disclaimer that this study was not a quantitative study measuring the magnitude of reading changes in the students. Instead, Kos clearly placed this study within the qualitative approach by using words such as *explore*. She focused attention on the central phenomenon of "factors" and provided a tentative definition by mentioning examples, such as "affective, social, and educational factors." She included this statement under a heading called "Purpose of the Study" to call attention to it, and she mentioned the participants. In the abstract and the methodology section, a reader finds out that the study used the inquiry strategy of case study research and that the study took place in a classroom.

#### Example 6.3 A Purpose Statement in an Ethnography

Rhoads (1997) conducted a 2-year ethnographic study exploring how the campus climate can be improved for gay and bisexual males at a large university. His purpose statement, included in the opening section, was as follows:

The article contributes to the literature addressing the needs of gay and bisexual students by identifying several areas where progress can be made in improving the campus climate for them. This paper derives from a two-year ethnographic study of a student subculture composed of gay and bisexual males at a large research university; the focus on men reflects the fact that lesbian and bisexual women constitute a separate student subculture at the university under study. (p. 276)

With intent to improve the campus, this qualitative study falls into the genre of advocacy research as mentioned in Chapter 1. Also, these sentences occur at the beginning of the article to signal the reader about the purpose of the study. The needs of these students become the central phenomenon under study, and the author seeks to identify areas that can improve the climate for gays and bisexual males. The author also mentioned that the strategy of inquiry is ethnographic and that the study will involve males (participants) at a large university (site). At this point, the author does not provide

#### Example 6.4 A Purpose Statement in a Grounded Theory Study

Richie and colleagues (1997) conducted a qualitative study to develop a theory of the career development of 18 prominent, highly achieving African American Black and White women in the United States working in different occupational fields. In the second paragraph of this study, they stated the purpose:

The present article describes a qualitative study of the career development of 18 prominent, highly achieving African-American Black and White women in the United States across eight occupational fields. Our overall aim in the study was to explore critical influences on the career development of these women, particularly those related to their attainment of professional success. (p. 133)

In this statement, the central phenomenon is career development, and the reader learns that the phenomenon is defined as critical influences in the professional success of the women. In this study, *success*, a directional word, serves to define the sample of individuals to be studied more than to limit the inquiry about the central phenomenon. The authors plan to explore this phenomenon, and the reader learns that the participants are all women, in different occupational groups. Grounded theory as a strategy of inquiry is mentioned in the abstract and later in the procedure discussion.

#### A Quantitative Purpose Statement

**Quantitative purpose statements** differ considerably from the qualitative models in terms of the language and a focus on relating or comparing variables or constructs. Recall from Chapter 3 the types of major variables: independent, mediating, moderating, and dependent.

The design of a quantitative purpose statement includes the variables in the study and their relationship, the participants, and the research site. It also includes language associated with quantitative research and the deductive testing of relationships or theories. A quantitative purpose statement begins with identifying the proposed major variables in a study (independent, intervening, dependent), accompanied by a visual model to clearly identify this sequence, and locating and specifying how the variables will be measured or observed. Finally, the intent of using the variables quantitatively will typically be either to relate variables, as one usually finds in a survey, or to compare samples or groups in terms of an outcome, as commonly found in experiments.

The major components of a good quantitative purpose statement include the following:

- Include words to signal the major intent of the study, such as *purpose*, *intent*, or *objective*. Start with “The purpose (or objective or intent) of this study is (was, will be) ...”
- Identify the theory, model, or conceptual framework. At this point, one does not need to describe it in detail; in Chapter 3, I suggested the possibility of writing a separate “Theoretical Perspective” section for this purpose. Mentioning it in the purpose statement provides emphasis on the importance of the theory and foreshadows its use in the study.
- Identify the independent and dependent variables, as well as any mediating, moderating, or control variables used in the study.
- Use words that connect the independent and dependent variables to indicate that they are related, such as “the relationship between” two or more variables or a “comparison of” two or more groups. Also, a purpose statement could be to “describe” variables. Most quantitative studies employ one or more of these three options for discussing variables in the purpose statement. A combination of comparing and relating might also exist—for example, a two-factor experiment in which the researcher has two or more treatment groups as well as a continuous independent variable. Although one typically finds studies about comparing two or more groups in experiments, it is also possible to compare groups in a survey study.

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Position of order the variables from left to right in the purpose statement—with the independent variable followed by the dependent variable. Place intervening variables between the independent and dependent variables. Many researchers also place the moderating variables between the independent and dependent variables. Alternatively, control variables might be placed immediately following the dependent variable in a phrase such as “controlling for ...” In experiments, the independent variable will always be the manipulated variable.

- Mention the specific type of strategy of inquiry (such as survey or experimental research) used in the study. By incorporating this information, the researcher anticipates the methods discussion and enables a reader to associate the relationship of variables to the inquiry approach.

- Make reference to the participants (or the unit of analysis) in the study, and mention the research site.

- Generally define each key variable, preferably using set and accepted established definitions found in the literature. General definitions are included at this point to help the reader best understand the purpose statement. They do not replace specific, operational definitions found later when a writer has a “Definition of Terms” section in a proposal (details about how variables will be measured). Also, delimitations that affect the scope of the study might be mentioned, such as the scope of the data collection or limited to certain individuals.

Based on these points, a quantitative purpose statement script can include these ideas:

The purpose of this \_\_\_\_\_ (experiment? survey?) study is (was? will be?) to test the theory of \_\_\_\_\_ that \_\_\_\_\_ (describes outcomes) or (compares? relates?) the \_\_\_\_\_ (independent variable) to \_\_\_\_\_ (dependent variable), controlling for \_\_\_\_\_ (control variables) for \_\_\_\_\_ (participants) at \_\_\_\_\_ (the research site). The independent variable(s) \_\_\_\_\_ will be defined as \_\_\_\_\_ (provide a definition). The dependent variable(s) will be defined as \_\_\_\_\_ (provide a definition), and the control and intervening variable(s), \_\_\_\_\_, (identify the control and intervening variables) will be defined as \_\_\_\_\_ (provide a definition).

The examples to follow illustrate many of the elements in these scripts. The first two studies are surveys; the last one is an experiment.

#### Example 6.5 A Purpose Statement in a Published Survey Study

Kalof (2000) conducted a 2-year longitudinal study of 54 college women about their attitudes and experiences with sexual victimization. These women responded to two identical mail surveys administered 2 years apart. The author combined the purpose statement, introduced in the opening section, with the research questions.

This study is an attempt to elaborate on and clarify the link between women’s sex role attitudes and experiences with sexual victimization. I used two years of data from 54 college women to answer these questions: (1) Do women’s attitudes influence vulnerability to sexual coercion over a two-year period? (2) Are attitudes changed after experiences with sexual victimization? (3) Does prior victimization reduce or increase the risk of later victimization? (p. 48)

Although Kalof (2000) did not mention a theory that she sought to test, she identified both her independent variable (sex role attitudes) and the dependent variable (sexual victimization). She positioned these variables from independent to dependent. She also discussed linking rather than relating the variables to establish a connection between them (or describing them). This passage identified the participants (women) and the research site (a college setting). Later, in the method section, she mentioned that the study was a mailed survey. Although she did not define the major variables, she provided specific measures of the variables in the research questions.

#### Example 6.6 A Purpose Statement in a Dissertation Survey Study

DeGraw (1984) completed a doctoral dissertation in the field of education on the topic of educators working in adult correctional institutions. Under a section titled “Statement of the Problem,” he advanced the purpose of the study:

THE PURPOSE OF THIS STUDY WAS TO EXAMINE THE RELATIONSHIP BETWEEN PERSONAL CHARACTERISTICS AND THE JOB motivation of certified educators who taught in selected state adult correctional institutions in the United States. Personal characteristics were divided into background information about the respondent (i.e., institutional information, education level, prior training, etc.) and information about the respondents' thoughts of changing jobs. The examination of background information was important to this study because it was hoped it would be possible to identify characteristics and factors contributing to significant differences in mobility and motivation. The second part of the study asked the respondents to identify those motivational factors of concern to them. Job motivation was defined by six general factors identified in the educational work components study (EWCS) questionnaire (Miskel & Heller, 1973). These six factors are: potential for personal challenge and development; competitiveness; desirability and reward of success; tolerance for work pressures; conservative security; and willingness to seek reward in spite of uncertainty vs. avoidance. (pp. 4-5)

This statement included several components of a good purpose statement. It was presented in a separate section, it used the word *relationship*, terms were defined, and the sample was specified. Further, from the order of the variables in the statement, one can clearly identify the independent variable and the dependent variable.

#### Example 6.7 A Purpose Statement in an Experimental Study

Booth-Kewley, Edwards, and Rosenfeld (1992) undertook a study comparing the social desirability of responding to a computer version of an attitude and personality questionnaire with completing a pencil-and-paper version. They replicated a study completed on college students that used an inventory, called Balanced Inventory of Desirable Responding (BIDR), composed of two scales: (a) impression management (IM) and (b) self-deception (SD). In the final paragraph of the introduction, they advanced the purpose of the study:

We designed the present study to compare the responses of Navy recruits on the IM and SD scales, collected under three conditions—with paper-and-pencil, on a computer with backtracking allowed, and on a computer with no backtracking allowed. Approximately half of the recruits answered the questionnaire anonymously and the other half identified themselves. (p. 563)

This statement also reflected many properties of a good purpose statement. The statement was separated from other ideas in the introduction as a separate paragraph; it mentioned that a comparison would be made, and it identified the participants in the experiment (i.e., the unit of analysis). In terms of the order of the variables, the authors advanced them with the dependent variable first, contrary to my suggestion (still, the groups are clearly identified). Although the theory base is not mentioned, the paragraphs preceding the purpose statement reviewed the findings of prior theory. The authors also did not tell us about the strategy of inquiry, but other passages, especially those related to procedures, identified the study as an experiment.

#### A Mixed Methods Purpose Statement

**Mixed methods purpose statements** contains the overall intent of the study, information about both the quantitative and qualitative strands of the study, and a rationale of incorporating both strands to study the research problem. These statements need to be identified early, in the introduction, and they provide major signposts for the reader to understand the quantitative and qualitative parts of a study. Several guidelines might direct the organization and presentation of the mixed methods purpose statement:

- Begin with words that signal intent, such as “The purpose of” or “The intent of.”
- Indicate the overall purpose of the study from a content perspective, such as “The intent is to learn about organizational effectiveness” or “The intent is to examine families with stepchildren.” In this way, the reader has an anchor to use to understand the overall study before the researcher divides the project into quantitative and qualitative strands.

• Discuss the reasons for combining both quantitative and qualitative data. This reason could be one of the following (see Chapter 10 for more detail about these reasons):

- To develop a complete understanding of a research problem by converging quantitative and qualitative data and comparing the two databases (a convergent design).
- To understand the data at a more detailed level by using qualitative follow-up data to help explain a quantitative database, such as a survey (see also O’Cathain, Murphy, & Nicholl, 2007) (an explanatory sequential design).
- To develop measurement instruments that actually fit a sample by first exploring qualitatively (e.g., through interviews) and using the information to design an instrument that then can be tested with a large sample (an exploratory sequential design).
- To incorporate these reasons into a larger design, such as an experiment (an embedded design), to frame them within a paradigm of social justice for a marginalized group (a transformative design), or to connect them to a single overall purpose in a multiphase, longitudinal program of research (a multiphase design).

Based on these elements, three examples of mixed methods purpose statement scripts follow based on the convergent, explanatory sequential, and exploratory sequential designs (Creswell & Plano Clark, 2011). This first example of a mixed methods purpose statement is a script for a convergent mixed methods strategy in which quantitative and qualitative data are collected and analyzed separately and the two databases compared to best understand a research problem.

This mixed methods study will address \_\_\_\_\_ [overall content aim]. A convergent mixed methods design will be used, and it is a type of design in which qualitative and quantitative data are collected in parallel, analyzed separately, and then merged. In this study, \_\_\_\_\_ [quantitative data] will be used to test the theory of \_\_\_\_\_ [the theory] that predicts that [independent variables] will \_\_\_\_\_ [positively, negatively] influence the \_\_\_\_\_ [dependent variables] for \_\_\_\_\_ [participants] at \_\_\_\_\_ [the site]. The \_\_\_\_\_ [type of qualitative data] will explore \_\_\_\_\_ [the central phenomenon] for \_\_\_\_\_ [participants] at \_\_\_\_\_ [the site]. The reason for collecting both quantitative and qualitative data is to \_\_\_\_\_ [the mixing reason].

This second script illustrates a mixed methods purpose statement for an explanatory sequential design in which the intent is to understand the quantitative database at a deeper level using follow-up qualitative data.

This study will address \_\_\_\_\_ [content aim]. An explanatory sequential mixed methods design will be used, and it will involve collecting quantitative data first and then explaining the quantitative results with in-depth qualitative data. In the first, quantitative phase of the study, \_\_\_\_\_ [quantitative instrument] data will be collected from \_\_\_\_\_ [participants] at \_\_\_\_\_ [research site] to test \_\_\_\_\_ [name of theory] to assess whether \_\_\_\_\_ [independent variables] relate to \_\_\_\_\_ [dependent variables]. The second, qualitative phase will be conducted as a follow up to the quantitative results to help explain the quantitative results. In this exploratory follow-up, the tentative plan is to explore \_\_\_\_\_ [the central phenomenon] with \_\_\_\_\_ [participants] at a \_\_\_\_\_ [research site].

The final script is an illustration of the purpose statement that might be used for an exploratory sequential design in which the intent is to develop measures (or instruments) that work with a sample by first collecting qualitative data and then using it to design measures or the instrument that can be tested with a sample of a population.

This study addresses \_\_\_\_\_ [content aim]. The purpose of this exploratory sequential design will be to first qualitatively explore with a small sample and then to determine if the qualitative findings generalize to a large sample. The first phase of the study will be a qualitative exploration of \_\_\_\_\_ [the central phenomenon] in which \_\_\_\_\_ [types of data] will be collected from \_\_\_\_\_ [participants] at \_\_\_\_\_ [research site]. From this initial exploration, the qualitative findings will be used to develop assessment measures that can be administered to a large sample. In the tentatively planned quantitative phase, \_\_\_\_\_ [instrument data] will be collected from \_\_\_\_\_ [participants] at \_\_\_\_\_ [research site].

It is helpful to look closely at several examples of purpose statements as found in recent published articles. Although these examples may not include all of the elements of the scripts, they do serve as examples of reasonably complete purpose statements that clearly convey the purpose of a mixed methods study. The discussion will be limited to the three core types of design: (a) a convergent design, (b) an explanatory sequential design, and (c) an exploratory sequential design. Other designs that expand these possibilities will be detailed further in Chapter 10.

#### Example 6.8 *A Convergent Mixed Methods Purpose Statement*

Classen and colleagues (2007) developed a health promotion model for older driver safety. Conducting a large secondary analysis of a national database, they examined the risk and protective factors influencing driver injuries (the quantitative phase). They also conducted a qualitative meta-synthesis of six studies to determine narrative results pertaining to needs, factors influencing safety, and safety priorities of older driver stakeholders (the qualitative phase). They then compared the two databases to integrate the results from both sets of data. Their purpose statement was as follows:

This study provided an explicit socio-ecological view explaining the interrelation of possible causative factors, an integrated summary of these factors, and empirical guidelines for developing public health interventions to promote older driver safety. Using a mixed methods approach, we were able to compare and integrate main findings from a national crash dataset with perspectives of stakeholders. (p. 677)

This passage was written into the abstract and perhaps it would have been better inserted into the introduction. It indicated the use of both quantitative and qualitative data; although more detail might have been given to identify the theory (a model was advanced at the beginning of the study), the specific variables analyzed and the central phenomenon of the qualitative phase of the study.

#### Example 6.9 *An Explanatory Sequential Mixed Methods Purpose Statement*

Ivankova and Stick (2007) studied factors contributing to students' persistence in a distributed doctoral program (distance online learning). They first collected survey data to examine external and internal program factors that might predict student persistence, and then they followed up with qualitative interviews of students that grouped into four categories of persistence. They ended by advancing case studies of four types of graduate persisters. The purpose statement was as follows:

The purpose of this mixed methods sequential explanatory study was to identify factors contributing to students' persistence in the ELHE program by obtaining quantitative results from a survey of 278 current and former students and then following up with four purposefully selected individuals to explore those results in more depth through a qualitative case study analysis. In the first, quantitative, phase of the study, the research questions focused on how selected internal and external variables to the ELHE program (program-related, advisor- and faculty-related, institutional-related, student-related factors, and external factors) served as predictors to students' persistence in the program. In the second, qualitative, phase, four case studies from distinct participant groups explored in-depth the results from the statistical tests. In this phase, the research questions addressed seven internal and external factors, found to have differently contributed to the function discriminating the four groups: program, online learning environment, faculty, student support services, self motivation, virtual community, and academic advisor. (p. 95)

In this example, the purpose statement closely followed the script advanced earlier for an explanatory sequential design. It began with an overall intent statement, followed by the identification of the first quantitative phase (including the specific variables examined), and then the qualitative follow-up phase. It ended with the four case studies and the mixed methods rationale to use the case studies to further explore the results from the statistical tests.

Myers and Oetzel (2003) created and validated a measure of organizational assimilation. This measure reflects the interactive mutual acceptance of newcomers into an organizational setting. The study began with interviewing members from advertising, banking, hospitality, university, nonprofit, and publishing industries, followed by the design of a survey that was then administered to a sample in order to validate the six emerging dimensions. The purpose statement was as follows:

What is needed then is an instrument to assess members' level of organizational assimilation. ... The study reported here proceeded in two stages. In the first stage, we explored dimensions of organizational assimilation to define the processes involved in transitioning from newcomer to organizational member. Stage one concluded with the development of an instrument that permits operationalization of the dimensions of organization assimilation. The second stage consisted of efforts to validate the measure, which we call the Organizational Assimilation Index (OAI). (p. 439)