

# TACKLING THE ISSUE OF GENERALIZATION IN QUALITATIVE STUDY: CASE STUDY OF DISTANCE LEARNING

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*Abstrak: Qualitative case study enables us to have a thick description and understanding of the reality. This paper suggests that while qualitative studies are not generalisable in the traditional sense of the word, nor do they claim to be, they can have other redeeming features which make them highly valuable in the education community. This can be achieved by extending the power to generalise to readers or other researchers through the concept of reliability in responding to the issue of generalisability in qualitative research. In doing so, this paper discussed Michael Bassey's fuzzy generalisation to explain the power play that readers can have in generating generalisation in qualitative research. The concept of relatability has its own merits, one that is justifiable and has its own potential to be developed. This paper is based on two qualitative case study on the experiences and perspectives of a small group of distance learners as they progress through their courses at Universiti Utara Malaysia (UUM).*

*Keywords: generalization, qualitative research, distance learning*

## INTRODUCTION

I like to introduce this paper by referring to a quotation made by Verma & Mallick's (1999: 198): *Generalisation is supposed to be a major aim of educational research*, and ask the following questions: *Is this always the case? Is generalisation the ultimate objective of educational research? Why generalisation is much a concern? Why generalizing? Why do we always have*

*to resort to generalising the research findings? Is generalisation always ever green and sustainable?*

The ultimate aim of qualitative research is to offer a perspective of a situation and provide well-written reports that reflect the researcher's ability to illustrate or describe the corresponding phenomenon. One of the greatest strengths of: the qualitative approach is the richness and depth of

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explorations and descriptions. The mission of qualitative research, as I understand it, is to discover meaning and understanding, rather than to verify truth or predict outcomes.

However, the fact remains, generalisation has always been a 'stumbling block' for researchers across the social sciences (Bassey, 1999; Hamilton, 1980; Lincoln & Cuba, 1985; Stake, 1978; Yin, 1984, 1994). This is even so in research culture where quantitative methods of research dominate over the use of qualitative research. Qualitative research has been criticized and regarded with suspicion and hostility, within the field of education and elsewhere, because its general characteristics remain poorly understood and consequently its potential remains underdeveloped (Adelman, Kemmis, & Jenkins, 1980; Sandelowski, 1986). This scenario is true within the educational research community in Malaysia. As a researcher, you are always faced with the questions of: *Are your findings generalisable?*, *What can your research contribute?* The use of qualitative method complicates the issue of generalisation even more. This is especially so in a 'hostile' research environment for such research approach. Qualitative researchers will inevitably have to confront not only with the above questions, but also with other critics and questions. For example, if you use *case study*, *Why use case study?* *What is its significant?*, *How will be carried out?* *Can 'X' number of respondents produce generalisable findings?*, *Why use just 'X' number of respondents?*, *Are the*

*samples representative of the population?*, etc. A familiar criticism of qualitative methodology questions the value of its dependence on small samples which is believed to render it incapable of generalizing conclusions (Yin, 1984, 1993, and 1994).

But, what one needs to understand is that qualitative case study enables the researcher to have a deep understanding of the reality. It provides a sense of 'being there'. Such deep understanding in turn enables us to understand much about what will never be understood by other research strategies.

The question about generalisability implicitly assumes that theories are only built upon statistical inference. However, it tends to forget that statistics are but one instrument to assist human minds to arrive at theories. Insightful findings in a case study is a theory in its own whether or not it is further developed to a theory about more cases. A theory which is well tested over one population does not necessarily apply to another population. In fact, this paper argues that it is a common mistake to over generalize what is true in one educational research to other situations, contexts or even countries. In addition, generalisation will decay over time. This paper considers some methodological aspects of collecting qualitative case study from distance learners (DLs) carried out in Universiti Utara Malaysia (UUM), Malaysia. Specifically, this paper introduces the concept of 'reliability' to respond to the issue of generalisability in qualitative research. This paper

suggests that while qualitative studies are not generalisable in the traditional sense of the word, nor do they claim to be, they can have other redeeming features which make them highly valuable in the education community. This can be achieved by extending the power to generalize to readers or other researchers through the concept of *relatability* in responding to the issue of generalisability in qualitative research. In doing so, this paper discussed Michael Bassey's/wzry *generalisation* to explain the power play that readers can have in generating generalisation in qualitative research. The concept of 'relatability' has its own merits, one that is justifiable and has its own potential to be developed. The objective of this research into distance learning is to generate insights and understanding into the questions of how and why, when and where distance learners at UUM tackle their studies. Specifically, the research objectives of this study are as follows: (1) To characterise the nature and content of DLs' learning in some detail; (2) To develop an

understanding of the barriers, the challenges that DLs encounter, and i the ways they cope with these problems; (3) To understand the distance learning process.

To demonstrate principles through which distance learning can be empowered and guided by the micro and macro environment surrounding the learners and their lives.

## RESEARCH METHOD

An instrumental qualitative case study (Stake, 1995) approach was employed to understand the experience of individual learners as they progressed through their study careers. The research used three different research instruments: the *interview* being the primary instrument, supplemented by *students' journals* and *photographs*. All the DLs involved in this study were interviewed on a one-to-one basis during the 2002 academic year. The following interview guide in table 1 was used as a framework to conduct the face to face interviews:

Table 1. The Interview Guide

Thematic Guideline	Consistent Topics	Additional Topic(s)
Experience of distance learning at Universiti Utara Malaysia	Interactions with Course Materials	Adult life
	Interactions with distance teachers & educators	Family life
	Interactions with other DLs	Attitude
	Attitudes towards distance learning	Future Career Plan

Lanjutan Tabel 1

Thematic Guideline	Consistent Topics	Additional Topic(s)
	Pull & push factors of DE	Impact of curriculum and individual learning style
	Learning style & behaviour	Impact of Malaysian 12 years of primary and secondary educational experience
	Coping Mechanism	Learning Differences

The interview guide helped to ensure good use of limited interview time available during the fieldwork. Most of the interviews were conducted in Bahasa Malaysia, and English language was only used when necessary and possible. The interviews were then transcribed and selectively translated and profiled.

The research informants for this study were Universiti Utara Malaysia DLs. Being subject to a management-based institution, naturally, the learners involved in this study were management and business students. Due to the heterogeneous characteristics of DLs, this study purposely engaged with DLs with various backgrounds to generate unique insights into how and why DLs of different backgrounds at UUM undertake and survive their distance learning. Specifically, DLs of different ethnic background (namely, Malays and Chinese) and of different gender were chosen to investigate the UUM DLs' learning process and experience.

The 12 research participants included 8 male and 4 female learners. In terms of ethnic and cultural background, 7 Malay learners and 5 Chinese

learners contributed to the findings of this research. All of the respondents had completed the 12 years mandatory education in Malaysia, and had completed form 5 (the fifth year of secondary education) and sat for the SPM (equivalent to GCSE level) examination. 50% of them had some post secondary education or had undergone some vocational training courses, and 25% or three out of the 12 participants had a teaching certificate from a teacher's college. The maturity of the students resulted in an overall average of 8.9 years of working experience. All of them had professional careers, including teaching, police, clerical, sales, technical, self-employed and secretarial work. Most of the students earned less than RM2,000 per month. It would seem that, despite quite high fees for DE courses, demand for places in such courses remains strong. Students seem willing to make considerable financial sacrifices to obtain a paper qualification. 90% of the students had an immediate family to care for. The average household size of the respondents was 4.7 people. Over 57% of the research participants came from households with 4-6 persons;

15% from households with 7 persons or more; while 25% came from households with 3 person or less.

It is important to listen to and understand DLs' voices and perspectives on DE in Malaysia because of the complex mix of cultures, languages and urban and rural factors. Additionally, there is a need to reflect on the effectiveness of the DE programmes, teaching and services provided from time to time. In doing so, DE providers and institutions need to get a balanced picture of what is 'right' and 'wrong' in their DE programmes, courses and administration. Understanding how the DE experience discourages or frustrates DLs enables DE providers and institutions, distance teachers and other stakeholders in DE to reflect and make constructive changes to create the condition for better distance learning in the future.

A study that focuses on DLs' perspectives and experiences in distance learning and their learning interactions is important for several reasons. First, there have been virtually no major studies that have sought the voices of DLs in Malaysia. For this reason, this research sought to explore and offer an understanding of DLs' perceptions of their educational experiences in distance learning, and to construct a rich and detailed account of the wide range of factors that might have influence and build the DLs' character and behaviour in distance learning at UUM.

Second, the current definitions of the term *distance learning* are vague, and vary within and across the open & distance learning (ODL) literature. Therefore, much confusion exists as to

what distance learning really entails. This in turn has created expectations that define what distance learning is all about from other stakeholders' *point of view*, not that of the DLs themselves. Considering the experiences of DLs in formulating definitions can help to clarify the term, perhaps creating new approaches to addressing the needs of this population.

Third, in order for UUM to improve and sustain its DE courses and programmes in the future, I strongly believe that it is essential for the institution to gain an understanding of the DLs with whom the institution is dealing - an understanding that goes beyond attendance records, and academic achievements.

Finally, the implications of this study are pertinent to how UUM DE administrators, distance teachers and educators organise courses and programmes, and educational activities to meet with the needs of the DLs. Ultimately, this study will contribute to a deeper understanding of how DLs perceive and experience distance learning at UUM. Such understanding will enhance our knowledge of how to go about designing and implementing effective future DE programmes and services for DLs in the future.

## RESULT AND DISCUSSION

This study offers research potential regarding learning support in distance education. The challenge, however, is to ensure that learning support in DE is sufficiently addressed in striving towards a better distance learning experience.

UUM, like any other dual mode institution, aims to be an effective

distance learning provider in Malaysia. If UUM, or for that matter any DE provider or institution, wishes to promote distance learning, issues pertaining to learning support must be addressed effectively. Apparent neglect of learning support which clearly link the learning environment, physical and social to student engagement and learning outcomes; inappropriate ways of measuring DLs' satisfaction need attention. The students as evident in this study, needed continuous human contact-the presence of a teacher figure to guide their learning. The meaning of such frustrations is not well understood by many UUM distance teachers, possibly due to the fact that a majority of them are "products" of a face to face institution themselves. As such: (1) They do not have any distance training and experience as far as developing distance course material is concerned; (2) They may be subject specialists, but with very little or no experience in DE; (3) They have not experienced the frustration that a distance learner does; (4) They may not understand what is involved for the student in being deprived of face to face interaction with their Distance teachers.

The consequence is that the distance teachers and educators have very little sympathy with the learners. They don't understand the degree of difficulties that DLs may have in pursuing their distance course. Distance teachers should be seen not just as knowledge providers but as learning support providers. In reality, the process of student learning at a distance as revealed in this study is more complex than the conventional face to face setting, the reason being, that the obs-

tacles that these DLs encounter may differ from one distance learner to another, with varying degrees of complexity.

The task is to design and offer a distance educational experience that encourages learning. DE providers need to understand that its educational products and services are to service the learner and provide an encouraging educational experience. We must consciously and actively develop and maintain approaches which enable learners to have their voices heard, and for distance teachers and educators, and UUM it self to be able to listen and understand the practical implications of what is being said. The learners should never be perceived as the problem, but should be perceived and integrated as part of the solution. Such an approach and attitude will benefit all stakeholders in DE.

Various conclusions can be drawn in respect to the role of the distance teachers in providing learning support to facilitate distance learning and subsequently striving towards providing a better distance learning experience.

1. As evident from the findings of this study, many of the respondents agreed that a strong concern in distance learning is the aspect of the "loneliness" or "isolation" experienced by the learner. It is for this reason the learning support needs to be as *supportive and nonjudgmental* as possible.
2. The learners' dependencies on distance teachers, and their desperation, were constantly evident in the data. Contrary to the assumption of many ODE institutions, that "it is a

mistake to assume that physical distance means loss of intimacy in interaction", 'loss of intimacy in interaction', particularly learning interaction, was strongly felt by students.

3. It is also evident that there is an urgent training and development need for distance teachers at UUM practice regarding learning support and the role that it can and should fulfil.
4. The learners value timely feedback from their teachers regarding course assignments, exams, projects and their inquiries. It is important then for distance teachers and educators to attend their students promptly and efficiently. Such commitment as evident in this paper will help to improve learning and ease many frustrations.
5. Institutional policy and the role of management are crucial in the establishment of an effective learning support to facilitate distance learning.

In designing the learning support, the study encourages the DE providers to choose appropriate combinations of methods for particular learning contexts. It is important to note that the recommendations that this research proposes for UUM are certainly not the ideal solution to learning support concerns in distance learning. Nor do they necessarily provide optimal advice pertaining to components within the learning support. They are, however, made in an earnest effort, firstly to sensitise distance teachers of the importance of their role in

providing learning support in distance learning and, more importantly, to stimulate thought, dialogue, and future research in providing learning support to DE programmes and courses.

The employment of qualitative methodology in this research does not mean that this research was intended to polarise *qualitative* versus *quantitative* research methods. Rather it was to the contrary. Although Morgan (1990) states that there can be factors within an organisation in DE which lead to what has been labelled an 'hegemony of survey method', this is not to claim superiority for one or the other method. The position set out by Saljo (1988: 35) provides a useful statement of a 'position' for this study on student learning:

...there is no necessary conflict between qualitative and quantitative approaches for generating and analysing data. ...Given the conception of learning outlined-it is evident that the family of methods conventionally referred to as qualitative is of primary importance. A thorough understanding of what learning means in concrete terms in various settings presupposes a detailed analysis of how students deal with the tasks they are presented...In saying this we are trying to establish another fundamental assumption behind the research into everyday human learning... Access to the learner's perspective on the activities of teaching and learning is essential for understanding educational phenomena... and for improving education.

Considering that focus of this research is the world of distance learners as they experience and

perceive it led me to conclude that:

1. As the phenomenon is heavily contextualised, developing an understanding of the macro and micro-contexts of the world of the distance student needs to be a central feature of the study.
2. The research must be 'naturalistic' in the sense that I should experience the reality of those involved in the study and, further, that I should attempt to convey this understanding to the reader.

As a DE researcher, I believe the individual distance learners' perceptions, as well as their actions, play an important part in the expression of their reality, and that this perceptual knowledge must be integral part of the research. Accordingly, this research study needs to harmonise an interpretative paradigm and a subjective-qualitative inquiry with value mediated results. The methods of gathering data should match those assumptions.

Multiple qualitative research methods situated in naturalistic inquiry and interpretive methodology were used on the advice of Denzin and Lincoln (1994: 2), who state that "the use of multiple methods, or triangulation, reflects an attempt to secure in depth understanding of the phenomenon in question. Objective reality can never be captured."

There is a final point to be made in relation to methodology that relates to the issue of 'research tradition', since my decision to undertake a qualitative approach in this study was intended to contribute to the popularisation of qualitative research in Malaysia. As noted earlier on, qualitative studies in

educational research are very limited in Malaysia, and to date, there has been very little work done using this form of educational inquiry, and none that I could find in the context of distance education. The dominant tradition has followed the positivist paradigm. A qualitative study offers a different approach from educational research in distance learning and generates a range of information of a different quality from that obtained in traditional approaches. Qualitative studies have been well developed and practised in developed countries, but the situation is not the same in developing countries like Malaysia. The research, and consequently this paper, I hope, will contribute to the growing field of qualitative educational research in Malaysia to use a qualitative methodology to study distance education at UUM, and in the country.

The most profound impact in my undertaking of this research that I can take back to Malaysia is the use of *qualitative case study* as the research methodology, though it is not very popular, in Malaysia. Although case study is hardly a 'technique' in its proper sense, it is typical of many qualitative researches and merits further discussion.

The choice of the *case* is by purposeful selection and not by sampling. Often, cases are outstanding in their own right (Yin, 1984; 1994). The general principle is to have the subjective type of case in mind before the identification of the case. This is very different from the case of sampling where subjective selection is avoided as much as possible.

At the beginning of the research,



little was known about the case-*distance learning at UUM*. The case in this study was selected by simple intuition. I decided to focus on this single case on a very unscientific ground: the UUM DE programme best fitted my picture of a 'dual system institution' providing both the conventional campus based education and DE. Such intuitions were inevitable because I was faced with the basic contradiction: if I did not know about what went on within the distance learning experience and environment at UUM, how would I know where to begin?

Researchers of qualitative case study are often confronted by such question. The case study approach in my study enables readers to have a deep understanding of the reality of distance learning from the students' own voice and experience. Such deep understanding in turn enables readers to understand much about what will never be understood by other research strategies about distance learning at the institution.

The question about generalisability implicitly assumes that theories are only built upon statistical inference. It tends to forget that statistics are but one instrument to assist researchers to arrive at theories. Insightful findings case study is a theory in its own, whether or not it is further developed to a theory about more cases. This is true with Piaget's theory of development psychology, which is based on only one case. Piaget's study of his daughter has led the establishment of his entire school of thought about developmental

psychology. This is also true with Graham Allison's multiple perspectives about decision making, which comes out of study of one case (Allison, 1971). This is again true with, for example, Phillip Foster's theory of 'Vocational education fallacy', which is based only on his knowledge about Ghana.

In this sense, similar situations occur with statistically supported theories. A theory which is well tested over one population does not necessarily apply to another population. In fact, it is a common mistake among researchers to over generalize what is true in one study to another, or in one school to the other, or in one country to other countries.

In addition, qualitative case study findings are rarely generalisable to a population or to other persons, times, or settings than those directly studied. However, it may be recognised that qualitative research '*adds*' something to statistical research. This '*something*' may be the meanings, the feelings, and the sense of the lived that cannot be measured and thus drawn into statistical manipulation. Often this '*something*' is characterised as '*depth*' in contrast to the '*breadth*' or the coverage that a quantitative project design supposedly delivers (see Schostak, 2002).

Limited generalisability is the consequence paid for the intensity of the Case Study method. In qualitative research, there are two aspects of generalisability: *internal generalisability* within the community, group, or institution studied to persons, events, and settings that were not directly observed or interviewed: and *external*

*generalisability* which refers to other communities, groups, or institutions. Internal generalisability is far more important for qualitative case studies because qualitative researchers rarely make explicit claims about their external generalisability of their accounts (see Maxwell, 1992). This study for example, has made it possible for UUM to better understand her DLs, and in particular, the research findings would allow the institution to reflect and address the shortcomings of its support system that has caused "loneliness" and "isolation" among the learners, and improve the distance educational experiences in the future. Though the number of learners participated in this study is small in numbers, nevertheless, the study was able to allow me as the researcher, and UUM as the interested stakeholder in this study to understand the learners' perspectives and experiences on distance learning at the institution.

Distance learning and qualitative research share the mutual goals of dealing with subjectivity, describing the complexity of lived experience, and appreciating realities where holism and intuition are valued. Qualitative methodology is, therefore, conducive to research that attempts to understand such human experiences as learning at a distance. Yin (1989:14), in discussing the case-study approach, stated that "the case study allows an investigator to retain the holistic and meaningful characteristics of real-life events...". This description covers the potential range of ways in which the case study approach might be used in researching distance learning or other educational problems and phenomenon. I strongly

believe that when the aims of research are understanding, extension of experience, and increase in conviction on what is known, the qualitative study is by far the better choice for a study on distance learning and may prove to produce the strongest data (Merriam, 1988).

The issue therefore remains on the extent to which Case Study can or should address the issue of generalisation. Different scholars (Stake, 1978; Hamilton, 1980, Polanyi, 1958 and Dilthey, 1976) and researchers provide strong case for rejecting the traditions of generalisability that are associated with the natural sciences. Many of them argue that traditional ways of thinking about generalisability are inadequate.

Lincoln & Guba (1985: 290) talk about *transferability* which they refer to whether knowledge gained from one context is relevant to or applicable for other contexts, or the same context in another time frame. Transferability assumes a role similar to generalisation. Any transferability is the responsibility of the reader who seeks to make the application of theory elsewhere, and of the original researcher.

Case Study can provide *vicarious experiences* that other approaches cannot. It offers an opportunity to experience vicariously, unique individuals within our own or another culture. Research on students' learning in my study permits readers to experience vicariously about students undergoing their own learning experience which I have communicated in a narrative portrayal of their experiences. For Schostak (2002 : 83),

revelatory case, which presents an opportunity to reveal what is otherwise inaccessible for researchers (Yin, 1984:42-43).

The use of single cases like my research is almost a general approach in human learning. Medical students understand human bodies by dissecting only one body, or at most a few. Car driving is often learnt on one particular car, and one can then drive any car. The single case adopted in my study allow me to fully understanding the internal relations within the complexity of distance learning reality, and that kind of understanding allows the learners to generalize to other cases, but not in the statistical sense of knowing the pattern across the population. One's learning about one car allows him or her to transfer the knowledge to drive other cars, but would not provide any knowledge of variations over different cars. Similarly, the study on students' perspectives and experiences on distance learning at UUM would allow the transfer of the findings internally to the bigger population of DLs at UUM. Even so, the degree of relatedness between the 12 learners in this study with the bigger UUM students' population varies as DLs are heterogeneous in many ways. They could be similar, or vastly different from each other. On an equal note, the findings, would not provide a base for generalisation to other students' population across different DE providers and institutions as there could be vast similarities and differences between DE systems, courses, and programmes, across the country. It all depends on the degree or relatedness and similarities of

circumstances, and the context between the DE experience at UUM and other DE institutions that will dictate for the transfer of knowledge from this study to another.

In the last section, attempts have been made to provide 'alternative' or solutions (partly or as a whole) to the intricate issue of generalisation. Stake (1978), concept of '*naturalistic generalisation*' and Hamilton's (1980) notion of a '*science of singular*' refer to evaluation research; and draw heavily on Polanyi (1958) notion of '*personalised*' were among plausible alternatives that are available. Nevertheless, Bassey (1999) *wzry generalisation* is one that caught my attention the most, and following are my thoughts on Bassey's idea.

I remembered vividly that just reading the title had me troubled with the *word fuzzy*. '*Fuzzyl Fuzzy generalisation*, what on earth does that entail?' Bassey just did not stop at X may influence Y, but went further to develop what he called a *best estimate of trustworthiness* (BET) to help estimate the likelihood of the influence.

Is it always true that 'do X in Y circumstances, and Z may be the case' is always an effect as claimed by Bassey? I object to Basseys' thinking on three accounts, *vagueness*, the *choice of ways* to help educational practice, policy and theory, and *contradiction* on the use of BET. He encourages us to increase attention to generalisations, universals, and away from the particulars of what was actually observed. Bassey suggests that as researchers we are longing to produce predictions, this is an idea that I find difficulty accepting. I feel that







