Introduction

Mouly (1978) states that while historical research cannot meet some of the tests of the scientific method interpreted in the specific sense of its use in the physical sciences (it cannot depend, for instance, on direct observation or experimentation, but must make use of reports that cannot be repeated), it qualifies as a scientific endeavour from the standpoint of its subscription to the same principles and the same general scholarship that characterize all scientific research.¹

Historical research has been defined as the systematic and objective location, evaluation and synthesis of evidence in order to establish facts and draw conclusions about past events (Borg 1963). It is an act of reconstruction undertaken in a spirit of critical inquiry designed to achieve a faithful representation of a previous age. In seeking data from the personal experiences and observations of others, from documents and records, researchers often have to contend with inadequate information so that their reconstructions tend to be sketches rather than portraits. Indeed, the difficulty of obtaining adequate data makes historical research one of the most taxing kinds of inquiry to conduct satisfactorily.¹ Reconstruction implies a holistic perspective in that the method of inquiry characterizing historical research attempts to ‘encompass and then explain the whole realm of man’s past in a perspective that greatly accent his social, cultural, economic, and intellectual development’ (Hill and Kerber, 1967).

Ultimately, historical research is concerned with a broad view of the conditions and not necessarily the specifics which bring them about, although such a synthesis is rarely achieved without intense debate or controversy, especially on matters of detail. The act of historical research involves the identification and limitation of a problem or an area of study; sometimes the formulation of a hypothesis (or set of questions); the collection, organization, verification, validation, analysis and selection of data; testing the hypothesis (or answering the questions) where appropriate; and writing a research report. This sequence leads to a new understanding of the past and its relevance to the present and future.

The values of historical research have been categorized by Hill and Kerber as follows:

- it enables solutions to contemporary problems to be sought in the past;
- it throws light on present and future trends;
- it stresses the relative importance and the effects of the various interactions that are to be found within all cultures;
- it allows for the revaluation of data in relation to selected hypotheses, theories and generalizations that are presently held about the past.

As the writers point out, the ability of history to employ the past to predict the future, and to use the present to explain the past, gives it a dual and unique quality which makes it especially useful for all sorts of scholarly study and research.²

The particular value of historical research in the field of education is unquestioned. It can, for
example, yield insights into some educational problems that could not be achieved by any other means. Further, the historical study of an educational idea or institution can do much to help us understand how our present educational system has come about; and this kind of understanding can in turn help to establish a sound basis for further progress or change. Historical research in education can also show how and why educational theories and practices developed. It enables educationalists to use former practices to evaluate newer, emerging ones. Recurrent trends can be more easily identified and assessed from a historical standpoint — witness, for example, the various guises in which progressiveism in education have appeared. And it can contribute to a fuller understanding of the relationship between politics and education, between school and society, between local and central government, and between teacher and pupil.*

Historical research in education may concern itself with an individual, a group, a movement, an idea or an institution. As Best (1970) points out, however, not one of these objects of historical interest and observation can be considered in isolation. No one person can be subjected to historical investigation without some consideration of his or her contribution to the ideas, movements or institutions of a particular time or place. These elements are always interrelated. The focus merely determines the point of emphasis towards which historical researchers direct their attention. Box 7.1 illustrates some of these relationships from the history of education. For example, no matter whether the historian chooses to study the Jesuit order, religious teaching orders, the Counter-Reformation or Ignatius Loyola, each of the other elements appears as a prominent influence or result, and an indispensable part of the narrative. For an example of historical research see Thomas (1992) and Gaukroger and Schwartz (1997).

**Choice of subject**

As with other methods we consider in this book, historical research may be structured by a flexible sequence of stages, beginning with the selection and evaluation of a problem or area of study. Then follows the definition of the problem in more precise terms, the selection of suitable sources of data, collection, classification and processing of the data, and finally, the evaluation and synthesis of the data into a balanced and objective account of the subject under investigation. There are, however, some important differences between the method of historical research and other research methods used in education. The principal difference has been highlighted by Borg:

> In historical research, it is especially important that the student carefully defines his problem and appraises its appropriateness before committing himself too fully. Many problems are not adaptable to historical research methods and cannot be adequately treated using this approach. Other problems have little or no chance of producing significant results either because of the lack of

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<table>
<thead>
<tr>
<th>Box 7.1</th>
<th>Some historical interrelations between men, movements and institutions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Men</strong></td>
<td><strong>Movements</strong></td>
</tr>
<tr>
<td>Ignatius Loyola</td>
<td>Counter-reformation</td>
</tr>
<tr>
<td>Benjamin Franklin</td>
<td>Scientific movement; Education for life</td>
</tr>
<tr>
<td>John Dewey</td>
<td>Experimentalist</td>
</tr>
</tbody>
</table>

Source Adapted from Best, 1970
pertinent data or because the problem is a trivial one.

(Borg, 1963)

One can see from Borg’s observations that the choice of a problem can sometimes be a daunting business for the potential researcher. Once a topic has been selected, however, and its potential and significance for historical research evaluated, the next stage is to define it more precisely, or, perhaps more pertinently, delimit it so that a more potent analysis will result. Too broad or too vague a statement can result in the final report lacking direction or impact. Best expresses it like this: “The experienced historian realizes that research must be a penetrating analysis of a limited problem, rather than the superficial examination of a broad area. The weapon of research is the rifle not the shotgun” (Best, 1970). Various prescriptions exist for helping to define historical topics. Gottschalk (1951) recommends that four questions should be asked in identifying a topic:

- Where do the events take place?
- Who are the people involved?
- When do the events occur?
- What kinds of human activity are involved?

As Travers (1969) suggests, the scope of a topic can be modified by adjusting the focus of any one of the four categories; the geographical area involved can be increased or decreased; more or fewer people can be included in the topic; the time span involved can be increased or decreased; and the human activity category can be broadened or narrowed. It sometimes happens that a piece of historical research can only begin with a rough idea of what the topic involves; and that delimitation of it can only take place after the pertinent material has been assembled.

In hand with the careful specification of the problem goes the need, where this is appropriate, for an equally specific and testable hypothesis (sometimes a sequence of questions may be substituted.) As in empirical research, the hypothesis gives direction and focus to data collection and analysis. It imposes a selection, a structure on what would otherwise be an overwhelming mass of information. As Borg (1963) observes:

Without hypotheses, historical research often becomes little more than an aimless gathering of facts. In searching the materials that make up the sources of historical research data, unless the student’s attention is aimed at information relating to specific questions or concerned with specific hypotheses, he [sic] has little chance of extracting a body of data from the available documents that can be synthesized to provide new knowledge or new understanding of the topic studied. Even after specific hypotheses have been established, the student must exercise strict self-control in his study of historical documents or he will find himself collecting much information that is interesting but is not related to his area of inquiry. If the student’s hypotheses are not sufficiently delimited or specific, it is an easy matter for him to become distracted and lose any by information that is not really related to his field of investigation.

Hill and Kerber (1967) have pointed out that the evaluation and formulation of a problem associated with historical research often involve the personality of the researcher to a greater extent than do other basic types of research. They suggest that personal factors of the investigator such as interest, motivation, historical curiosity, and educational background for the interpretation of historical facts tend to influence the selection of the problem to a great extent.

Data collection

One of the principal differences between historical research and other forms of research is that historical research must deal with data that already exist. Hockett (1955) expresses it thus:

History is not a science of direct observation, like chemistry and physics. The historian like the geologist interprets past events by the traces they have left; he deals with the evidence of man’s past acts and thoughts. But the historian, no less than the sci-
entist, must utilize evidence resting on reliable observation. The difference in procedure is due to the fact that the historian usually does not make his own observations, and that those upon whose observations he must depend are, or were, often if not usually untrained observers. Historical method is, strictly speaking, a process supplementary to observations, a process by which the historian attempts to test the truthfulness of the reports of observations made by others. Like the scientist, he [sic] examines his data and formulates hypotheses, i.e. tentative conclusions. These conjectures he must test by seeking fresh evidence or re-examining the old, and this process he must continue until, in the light of all available evidence, the hypotheses are abandoned as untenable or modified until they are brought into conformity with the available evidence.

(Hockett, 1955)

Sources of data in historical research may be classified into two main groups: primary sources, which are the life blood of historical research; and secondary sources, which may be used in the absence of, or to supplement, primary data.

Primary sources of data have been described as those items that are original to the problem under study and may be thought of as being in two categories, thus:

1. The remains or relics of a given period. Although such remains and artefacts as skeletons, fossils, weapons, tools, utensils, buildings, pictures, furniture, coins and objects d’art were not meant to transmit information to subsequent eras, nevertheless they may be useful sources providing sound evidence about the past.

2. Those items that have had a direct physical relationship with the events being reconstructed. This category would include not only the written and oral testimony provided by actual participants in, or witnesses of, an event, but also the participants themselves. Documents considered as primary sources include manuscripts, charters, laws; archives of official minutes or records, files, letters, memoranda, memoirs, biography, official publications, wills, newspapers and magazines, maps, diagrams, catalogues, films, paintings, inscriptions, recordings, transcriptions, log books and research reports. All these are, intentionally or unintentionally, capable of transmitting a first-hand account of an event and are therefore considered as sources of primary data. Historical research in education draws chiefly on the kind of sources identified in this second category.

Secondary sources are those that do not bear a direct physical relationship to the event being studied. They are made up of data that cannot be described as original. A secondary source would thus be one in which the person describing the event was not actually present but who obtained descriptions from another person or source. These may or may not have been primary sources. Other instances of secondary sources used in historical research include: quoted material, textbooks, encyclopedias, other reproductions of material or information, prints of paintings or replicas of art objects. Best (1970) points out that secondary sources of data are usually of limited worth because of the errors that result when information is passed on from one person to another.

Various commentators stress the importance of using primary sources of data where possible (Hill and Kerber, 1967). The value, too, of secondary sources should not be minimized. There are numerous occasions where a secondary source can contribute significantly to more valid and reliable historical research than would otherwise be the case.

One further point: the review of the literature in other forms of educational research is regarded as a preparatory stage to gathering data and serves to acquaint researchers with previous research on the topics they are studying (Travers, 1969). It thus enables them to continue in a tradition, to place their work in context, and to learn from earlier endeavours. The function of the review of the literature in historical research, however, is different in that it provides the data
for research; the researchers’ acceptance or otherwise of their hypotheses will depend on their selection of information from the review and the interpretation they put on it. Borg (1963) has identified other differences: one is that the historical researcher will have to peruse longer documents than the empirical researcher who normally studies articles very much more succinct and precise. Further, documents required in historical research often date back much further than those in empirical research. And one final point: documents in education often consist of unpublished material and are therefore less accessible than reports of empirical studies in professional journals.

For a detailed consideration of the specific problems of documentary research, the reader is referred to the articles by Platt (1981) where she considers authenticity, availability of documents, sampling problems, inference and interpretation.

**Evaluation**

Because workers in the field of historical research gather much of their data and information from records and documents, these must be carefully evaluated so as to attest their worth for the purposes of the particular study. Evaluation of historical data and information is often referred to as historical criticism and the reliable data yielded by the process are known as historical evidence. Historical evidence has thus been described as that body of validated facts and information which can be accepted as trustworthy, as a valid basis for the testing and interpretation of hypotheses. Historical criticism is usually undertaken in two stages: first, the authenticity of the source is appraised; and second, the accuracy or worth of the data is evaluated. The two processes are known as external and internal criticism respectively, and since they each present problems of evaluation they merit further inspection.

**External criticism**

External criticism is concerned with establishing the authenticity or genuineness of data. It is therefore aimed at the document (or other source) itself rather than the statements it contains; with analytic forms of the data rather than the interpretation or meaning of them in relation to the study. It therefore sets out to uncover frauds, forgeries, hoaxes, inventions or distortions. To this end, the tasks of establishing the age or authorship of a document may involve tests of factors such as signatures, handwriting, script, type, style, spelling and place-names. Further, was the knowledge it purports to transmit available at the time and is it consistent with what is known about the author or period from another source? Increasingly sophisticated analyses of physical factors can also yield clues establishing authenticity or otherwise: physical and chemical tests of ink, paper, parchment, cloth and other materials, for example. Investigations in the field of educational history are less likely to encounter deliberate forgeries than in, say, political or social history, though it is possible to find that official documents, correspondence and autobiographies have been ‘ghosted’, that is, prepared by a person other than the alleged author or signer.

**Internal criticism**

Having established the authenticity of the document, the researcher’s next task is to evaluate the accuracy and worth of the data contained therein. While they may be genuine, they may not necessarily disclose the most faithful picture. In their concern to establish the meaning and reliability of data, investigators are confronted with a more difficult problem than external criticism because they have to establish the credibility of the author of the documents. Travers (1969) has listed those characteristics commonly considered in making evaluations of writers. Were they trained or untrained observers of the events? In other words, how competent were they? What were their relationships to the events? To what extent were they under pressure, from fear or vanity, say, to distort or omit facts? What were the intents of the writers of the documents? To what extent were
they experts at recording those particular events? Were the habits of the authors such that they might interfere with the accuracy of recordings? Were they too antagonistic or too sympathetic to give true pictures? How long after the event did they record their testimonies? And were they able to remember accurately? Finally, are they in agreement with other independent witnesses?

Many documents in the history of education tend to be neutral in character, though it is possible that some may be in error because of these kinds of observer characteristics. A particular problem arising from the questions posed by Travers is that of bias. This can be particularly acute where life histories are being studied. The chief concern here, as Plummer (1983) reminds us, resides in examining possible sources of bias which prevent researchers from finding out what is wanted and using techniques to minimize the possible sources of bias.

Researchers generally recognize three sources of bias: those arising from the subject being interviewed, those arising from themselves as researchers and those arising from the subject-researcher interaction (Travers, 1969).³

Writing the research report

Once the data have been gathered and subjected to external criticism for authenticity and to internal criticism for accuracy and to internal criticism for accuracy and to internal criticism for accuracy and to internal criticism for accuracy, the researcher is next confronted with the task of piecing together an account of the events embraced by the research problem. This stage is known as the process of synthesis. It is probably the most difficult phase in the project and calls for considerable imagination and resourcefulness. The resulting pattern is then applied to the testing of the hypothesis.

The writing of the final report is equally demanding and calls for creativity and high standards of objective and systematic analysis.

Best (1970) has listed the kinds of problems occurring in the various types of historical research projects submitted by students. These include:

- Defining the problem too broadly.
- The tendency to use easy-to-find secondary sources of data rather than sufficient primary sources, which are harder to locate but usually more trustworthy.
- Inadequate historical criticism of data, due to failure to establish authenticity of sources and trustworthiness of data. For example, there is often a tendency to accept a statement as necessarily true when several observers agree. It is possible that one may have influenced the others, or that all were influenced by the same inaccurate source of information.
- Poor logical analysis resulting from:
  - oversimplification – failure to recognize the fact that causes of events are more often multiple and complex than single and simple;
  - overgeneralization on the basis of insufficient evidence, and false reasoning by analogy, basing conclusions upon superficial similarities of situations;
  - failure to interpret words and expression in the light of their accepted meaning in an earlier period;
  - failure to distinguish between significant facts in a situation and those that are irrelevant or unimportant.
- Expression of personal bias, as revealed by statements lifted out of context for purposes of persuasion, assuming too generous or uncritical an attitude towards a person or idea (or being too unfriendly or critical), excessive admiration for the past (sometimes known as the 'old oaken bucket' delusion), or an equally unrealistic admiration for the new or contemporary, assuming that all change represents progress.
- Poor reporting in a style that is dull and colourless, too flowery or flippant, too persuasive or of the 'soap-box' type, or lacking in proper usage.

Borg and Gall (1979: 400) suggest several mistakes that can be made in conducting historical research:

The selection of a topic for which historical sources are slight, inaccessible or non-existent.

- Over-reliance on secondary sources.
- Failure to subject the historical sources to internal or external validity/criticism checks.
- Lack of reflexivity and the researcher's selectivity and bias in using sources.
- Importing concepts from other disciplines.
- Making illegitimate inferences of causality and moncausality.
- Generalizing beyond acceptable limits of the data.
- Listing facts without appropriate thematization.

In addition to these, Sutherland (1969) has brilliantly illustrated two further common errors among historians of education. These are first, projecting current battles backwards onto a historical background which leads to distortion; and second, 'description in a vacuum' which fails to illustrate the relationship of the educational system to the structure of society. To conclude on a more positive note Mouly (1978) itemizes five basic criteria for evaluating historical research:

- **Problem** Has the problem been clearly defined? It is difficult enough to conduct historical research adequately without adding to the confusion by starting out with a nebulous problem. Is the problem capable of solution? Is it within the competence of the investigator?
- **Data** Are data of a primary nature available in sufficient completeness to provide a solution, or has there been an overdependence on secondary or unverifiable sources?
- **Analysis** Has the dependability of the data been adequately established? Has the relevance of the data been adequately explored?
- **Interpretation** Does the author display adequate mastery of his [sic] data and insight into the relative significance? Does he display adequate historical perspective? Does he maintain his objectivity or does he allow personal bias to distort the evidence? Are his hypotheses plausible? Have they been adequately tested? Does he take a sufficiently broad view of the total situation? Does he see the relationship between his data and other 'historical facts'?
- **Presentation** Does the style of writing attract as well as inform? Does the report make a contribution on the basis of newly discovered data or new interpretation, or is it simply 'uninspired hack-work'? Does it reflect scholarliness?

**The use of quantitative methods**

By far the greater part of research in historical studies is qualitative in nature. This is so because the proper subject-matter of historical research consists to a great extent of verbal and other symbolic material emanating from a society's or a culture's past. The basic skills required of the researcher to analyse this kind of qualitative or symbolic material involve collecting, classifying, ordering, synthesizing, evaluating and interpreting. At the basis of all these acts lies sound personal judgement. In the comparatively recent past, however, attempts have been made to apply the quantitative methods of the scientist to the solution of historical problems (Travers, 1969). Of these methods, the one having greatest relevance to historical research is that of content analysis, the basic goal of which is to take a verbal, non-quantitative document and transform it into quantitative data (Bailey, 1978).

Content analysis itself has been defined as 'a multipurpose research method developed specifically for investigating a broad spectrum of problems in which the content of communication serves as a basis of inference', from word counts (Travers, 1969) to categorization. Approaches to content analysis are careful to identify appropriate categories and units of analysis, both of which will reflect the nature of the document being analysed and the purpose of the research. Categories are normally determined after initial inspection of the document and will cover the main areas of content.
We can readily see how the technique of content analysis may be applied to selected aspects of historical research in education. It could be used, for instance, in the analysis of educational documents. In addition to elucidating the content of the document, the method may throw additional light on the source of the communication, its author, and on its intended recipients, those to whom the message is directed. Further, an analysis of this kind would tell us more about the social context and the kinds of factors stressed or ignored, and of the influence of political factors, for instance. It follows from this that content analysis may form the basis of comparative or cross-cultural studies. The purposes of content analysis have been identified by Holsti (1968):

- To describe trends in communication content.
- To relate known characteristics of sources to messages they produce.
- To audit communication content against standards.
- To analyse techniques of persuasion.
- To analyse style.
- To relate known attributes of the audience to messages produced for them.
- To describe patterns of communication.

Different examples of the use of content analysis in historical contexts are provided by Thomas and Znaniecki (1918) and Bradburn and Berlew (1961). A further example of content analysis in historical settings is McClelland et al.'s (1953) study of the relationship between the need to achieve (n'ach, for short) among members of a society and the economic growth of the particular society in question. Finally, for a more detailed and technical consideration of the use of quantitative methods in historical research, a study which looks at the classifying and arranging of historical data and reviews basic descriptive statistics, the reader is referred to Floud (1979).

**Life histories**

Thomas and Znaniecki's monumental study, *The Polish Peasant in Europe and America* (1918), serves as an appropriate introduction to this section, for their detailed account of the life and times of Wladek Wisniewski is commonly held to be the first sociological life history.

The life history, according to Plummer (1983), is frequently a full-length book about one person's life in his or her own words. Often, Plummer observes, it is gathered over a number of years, the researcher providing gentle guidance to the subject, encouraging him or her either to write down episodes of life or to tape-record them. And often as not, these materials will be backed up with intensive observations of the subject's life, with interviews of the subject's friends and acquaintances and with close scrutiny of relevant documents such as letters, diaries and photographs. Essentially, the life history is an 'interactive and co-operative technique directly involving the researcher' (Plummer, 1983).

Recent accounts of the perspectives and interpretations of people in a variety of educational settings are both significant and pertinent, for they provide valuable 'insights into the ways in which educational personnel come to terms with the constraints and conditions in which they work' (Goodson, 1983). Life histories, Goodson argues, 'have the potential to make a far-reaching contribution to the problem of understanding the links between "personal troubles" and "public issues", a task that lies at the very heart of the sociological enterprise'. Their importance, he asserts, 'is best confirmed by the fact that teachers continually, most often unsolicited, import life history data into their accounts of classroom events' (Goodson, 1983).

Miller (1999) demonstrates that biographical research is a distinctive way of conceptualizing social activity. He provides outlines of the three main approaches to analysis, that is to say:

- the realist which is focused upon grounded-theory techniques;
- the neo-positivist, employing more structured interviews; and
- the narrative with its emphasis on using the interplay between interviewer and interviewee to actively construct life histories.
Denzin (1999) suggests that there are several varieties of biographical research methods including: biography, autobiography, story, discourse, narrative writing, personal history, oral history, case history, life history, personal experience, and case study. This is addressed further by Connolly and Clandinin (1999) who indicate several approaches to narrative inquiry:

- oral history;
- stories;
- annals and chronicles;
- photographs;
- memory boxes;
- interviews;
- journals;
- autobiography;
- letters;
- conversations;
- and documents.

In exploring the appropriateness of life history techniques to a particular research project, and with ever-present constraints of time, facilities and finance in mind, it is useful to distinguish life histories both by type and mode of presentation, both factors bearing directly upon the scope and feasibility of the research endeavour. Box 7.2 draws on an outline by Hitchcock and Hughes (1989). Readers may wish to refer to the descriptions of types and modes of presentation contained in Box 7.2 in assessing the differing demands that are made on intending researchers as they gather, analyse and present their data.

Whether retrospective or contemporaneous, a life history involves five broad research processes. These have been identified and described by Plummer (1983).

**Preparation**

This involves the researcher both in selecting an appropriate problem and devising relevant research techniques. Questions to be asked at this stage are first, ‘Who is to be the object of the study?’ – the great person, the common person, the volunteer, the selected, the coerced? Second, ‘What makes a good informant?’ Plummer draws attention to key factors such as accessibility of place and availability of time, and the awareness of the potential informant of his/her particular cultural milieu. A good informant is able and willing to establish and maintain a close, intimate relationship with the researcher. It is axiomatic that common sympathies and mutual respect are prerequisites for the sustenance and success of a life history project. Third, ‘What needs clarifying in the early stages of the research?’ The motivations of the researcher need to be made explicit to the intended subject. So too, the question of remuneration for the subject’s services should be clarified from the outset. The issue of anonymity must also be addressed, for unlike other research methodologies, life histories reveal intimate details (names, places, events) and provide scant cover from prying eyes. The earlier stages of the project also provide opportunities for discussing with the research subject the precise nature of

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**Box 7.2**

A typology of life histories and their modes of presentation

<table>
<thead>
<tr>
<th>Types</th>
<th>Description</th>
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<tbody>
<tr>
<td>Retrospective life history</td>
<td>A reconstruction of past events from the present feelings and interpretations of the individual concerned.</td>
</tr>
<tr>
<td>Contemporaneous life history</td>
<td>A description of an individual’s daily life in progress, here and now.</td>
</tr>
</tbody>
</table>

**Modes of Presentation**

- **Naturalistic**
  a first-person life history in which the life story is largely in the words of the individual subject, supported by a brief introduction, commentary and conclusion on the part of the researcher.
- **Thematically-edited**
  subject’s words are retained intact but are presented by the researcher in terms of a series of themes, topics or headings, often in chapter-by-chapter format.
- **Interpreted and edited**
  the researcher’s influence is most marked in his/her version of a subject’s life story which the researcher has sifted, distilled, edited and interpreted.

Source: Adapted from Hitchcock and Hughes, 1989
the life history study, the logistics of interview situations and modes of data recording.

**Data collection**

Central to the success of a life history is the researcher's ability to use a variety of interview techniques (see also Chapter 15). As the occasion demands, these may range from relatively structured interviews that serve as general guides from the outset of the study, to informal, unstructured interviews reminiscent of non-directive counselling approaches espoused by Carl Rogers (1945) and his followers. In the case of the latter, Plummer (1983) draws attention to the importance of empathy and 'non-possessive warmth' on the part of the interviewee. A third interviewing strategy involves a judicious mixture of participant observation (see Chapter 17) and casual chatting, supplemented by note-taking.

**Data storage**

Typically, life histories generate enormous amounts of data. Intending researchers must make early decisions about the use of tape recorders, the how, what and when of their transcription and editing, and the development of coding and filing devices if they are to avoid being totally swamped by the materials created. Readers are referred to the discussion in Chapter 9 and to Fiedler's (1978) extensive account of methods appropriate to field studies in natural settings.

**Data analysis**

Three central issues underpin the quality of data generated by life history methodology. They are to do with representativeness, reliability and validity (see also Chapters 5, 9 and 15).

Plummer draws attention to a frequent criticism of life history research, namely that its cases are atypical rather than representative. To avoid this charge, he urges intending researchers to 'work out and explicitly state the life history's relationship to a wider population' (Plummer, 1983) by way of appraising the subject on a continuum of representativeness and non-representativeness.

Reliability in life history research hinges upon the identification of sources of bias and the application of techniques to reduce them. Bias arises from the informant, the researcher, and the interactional encounter itself (Plummer, 1983), and these were presented in Box 5.1. Several validity checks are available to intending researchers. Plummer identifies the following:

- The subject of the life history may present an autocritique of it, having read the entire product.
- A comparison may be made with similar written sources by way of identifying points of major divergence or similarity.
- A comparison may be made with official records by way of imposing accuracy checks on the life history.
- A comparison may be made by interviewing other informants.

Essentially, the validity of any life history lies in its ability to represent the informant's subjective reality, that is to say, his or her definition of the situation.

**Data presentation**

Plummer provides three points of direction for the researcher intent upon writing a life history. First, have a clear view of who you are writing for and what you wish to accomplish by writing the account. Are you aiming to produce a case history or a case study? Case histories 'tell a good story for its own sake' (Plummer, 1983). Case studies, by contrast, use personal documents for wider theoretical purposes such as the verification and/or the generation of theory. Second, having established the purpose of the life history, decide how far you should intrude upon your assembled data. Intrusion occurs both through editing and interpreting. Editing ('cutting', sequencing, disguising names, places etc.) is almost a sine qua non of any life history study.
Paraphrasing Plummer, editing involves getting your subject's own words, grasping them from the inside and turning them into a structured and coherent statement that uses the subject's words in places and your own, as researcher, in others, but retains their authentic meaning at all times. Third, as far as the mechanics of writing a life history are concerned, practise writing regularly. Writing, Plummer observes, needs working at, and daily drafting, revising and redrafting is necessary. For an example of life history methodology and research see Evetts (1991).