

FESTSCHRIFT IN HONOUR OF KATHY CHARMAZ

Edited by Antony Bryant
and Adele E. Clarke

STUDIES IN SYMBOLIC
INTERACTION

VOLUME 56

FESTSCHRIFT IN HONOUR OF
KATHY CHARMAZ

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STUDIES IN SYMBOLIC INTERACTION VOLUME 56

FESTSCHRIFT IN HONOUR OF KATHY CHARMAZ

EDITED BY

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INVESTOR IN PEOPLE

For Kathy Charmaz and Norm Denzin with profound appreciation.

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Denise R. Simmons, PhD, PE, PMP, LEED-AP, is the Associate Dean for Workforce Development in the Herbert Wertheim College of Engineering at the University of Florida. She has over 10 years of construction and civil engineering experience working for energy companies and as a project management consultant; over 15 years of experience in academia; and extensive experience leading and conducting multi-institutional, workforce-related research and outreach. She is concerned first about the human condition and driven and inspired by what a civil engineering or construction organization can achieve related to sustainability and the triple bottom line by attending to the needs of its people. Supported by more than \$7.5M in federal funding and with results disseminated across more than 100 refereed publications, her research focuses on developing and sustaining an effective engineering workforce, with specific emphasis on topics related to civil engineering; engineering education; and inclusion. As director of the Simmons Research Lab, her current interests include competency development via education and training; interactions between humans and technology; and conceptualization of leadership in engineering.

Robert Thornberg is Professor of Education at the Department of Behavioural Sciences and Learning at Linköping University in Sweden. He has previously been a member and the Secretary of the Board for the Nordic Educational

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VOLUME EDITORS' PREFACE

The chapters that comprise this *Festschrift* for Kathy Charmaz are testimony both to her powerful and enduring legacies across many academic fields and to her profound interactions with and commitment to those she encountered in her extensive scholarly sojourns.

True to form, as Adele Clarke explains in her contribution, Kathy made clear and precise arrangements for this *Festschrift* in the weeks before she died in July 2020. Earlier in the year she had prepared detailed instructions regarding a possible session in her memory at the SSSI conference scheduled for 2021 in Chicago. As the pandemic intensified, however, it was clear that such events were no longer on the agenda in the foreseeable future. Fortunately, Norm Denzin immediately came forward with the generous offer to publish a *Festschrift* in Kathy's honour in his series *Studies in Symbolic Interaction*. Kathy was really thrilled and honoured by this, and she was able to discuss her wishes with Adele for how this should be developed, who should edit the collection, and who should be approached to contribute.

We were particularly keen that the *Festschrift* did justice to the profound and varied ways in which Kathy's work has inspired and stimulated practitioners as well as researchers. As such, our invitation noted that we welcomed contributions that incorporated some level of reminiscence and personal reflection, but also focused on the substantive ways in which contributors had benefitted from Kathy's work – building upon, extending, and enhancing her ideas. We requested that contributors discuss their own work in this regard, and the work of others who have taken up Kathy's work and influence along similar lines.

When Tony and Kathy were preparing *The Handbook of Grounded Theory* (2007), they were told that of the 30 or so potential contributors no more than 50% would accept the invitation, and that they should plan the volume accordingly. In the event, not only did all those invited respond positively, but several of those who had been invited to review the proposal asked if they could also be included. Everyone wanted to be associated with a collection edited by Kathy! Subsequently for *The Handbook of Current Developments* (2021), all those invited eventually contributed chapters, and in this case, under Kathy's careful guidance, the invitations went to a wide and international selection of authors, ranging across a variety of disciplines. It was therefore no surprise to us that all the invitations for her *Festschrift* prompted speedy, positive, and enthusiastic responses.

Kathy's knowledge of writers and researchers engaged in grounded theory and qualitative research in general was encyclopaedic. Those with whom she corresponded and collaborated encompassed seasoned researchers as well as those at

earlier stages of their careers and was not restricted geographically. Consequently, the 14 contributions which comprise this volume are testimony to Kathy's international reputation, as well as her rich and varied networks. A few are brief, largely personal accounts and reminiscences; others are more substantial, but even these highlight Kathy's personal relationship with the author(s) in addition to her influence and input as researcher, scholar and authoritative writer.

Norm Denzin's is the shortest contribution, but his role in promoting and supporting Kathy cannot be overestimated. For example, he made sure her legacy was acknowledged in her lifetime by receiving in 2018 the Lifetime Achievement Award in Qualitative Inquiry for Dedication and Contributions to Qualitative Research, Teaching, and Practice, International Congress of Qualitative Inquiry. Kathy was always ready to offer anecdotes about herself, including the oft-repeated and highly deprecatory one about Anselm Strauss telling her she couldn't write! This may have held a grain of truth in the 1970s, but those of us who wrote with her over the past 25+ years can readily attest to the high standards of writing to which she adhered, and which she also expected from her collaborators. Amongst her colleagues, however, she was always ready to stress how important Norm had been to her; offering her a platform for her papers and conference presentations – opportunities that elsewhere were usually only available to those with positions at prestigious institutions, and then largely restricted to men. Kathy was convinced that, but for the support of Norm and a few others, her work would have been largely ignored, or “borrowed” by others and passed off as theirs. In preparing the *Festschrift*, this was pointed out to Norm whose immediate response was that this was the lesser part of their mutual debt; he owed far more to Kathy than she owed to him.

Janice Morse and Adele Clarke were near contemporaries of Kathy, all key representatives of the “Second Generation” of Grounded Theorists (Morse et al., 2009, 2021). Here Morse offers a brief sketch of Kathy's early years and upbringing, contextualizing the enormous challenges she faced both in general terms as a woman trying to make her way in the class-based and male-dominated academic world of the 1960s and 1970s, and personally battling with ill-health and a variety of blows to her self-esteem as she developed her career. Deliberately making extensive use of Kathy's own words, Morse shows how Kathy succeeded “in spite of” a whole host of trials and obstacles, drawing on her background and personal experiences to enrich her studies and writings. The result is an object lesson in research practice – that remaining continuously engaged with one's research participants, themselves often embroiled in the harsh realities of life, is adhering to the highest standards of academic rigour and clarity.

Clarke's contribution complements this, focusing on Kathy's “late flowering,” specifically the work Kathy produced in the last 25 years of her life, largely developing her constructivist grounded theory. In effect Clarke argues that the richness and measure of Kathy's later work emanated from the complexities and challenges of her early years, moving from occupational therapy into an academic career. Her becoming an academic was “accidental,” but provided a unique combination of experiences and social awareness which she drew upon in

her later work centered on social justice. Taken together with Morse's chapter, we can see that Kathy not only overcame the early obstacles put in her way, but used her experience of overcoming them as a foundation for moving from trepidation and apprehension to becoming "older, wiser, and much more daring."

The contributions from Hisako Kakai and Mitsuyuki Inaba, and Gary Fine span Kathy's development as the doyenne of constructivist ground theory. Fine shows how Kathy's landmark work from 1991, *Good Days, Bad Days*, opens up the temporal and reflexive aspects of qualitative research, "the threads of temporality as integral to identity." Kakai and Inaba then take Kathy's work into the era of Big Data and text mining, not simply as a technology-oriented technique but as an encouragement for researchers wanting to promote social justice.

Kathy's concern to encourage researchers from far and wide is exemplified in the contributions from César Cisneros-Puebla (Chile), Greg Hadley (Japan), Elizabeth Hordge-Freeman (Brazil), and Kumar Ravi Priya (India), as well as that from Kakai and Inaba (Japan). They all indicate how Kathy's re-orientation of GTM laid the intellectual foundations for their work. But crucially, in all cases, this was accompanied by an intensely personal form of support and mentoring by Kathy herself. This is also a key aspect of the contributions from Terrie Vann Ward, Denise Simmons, and Elaine Keane. In the words of Vann Ward, being mentored by Kathy was the chance to experience "an educated woman striving to do her best in sharing what she had with all she encountered."

The remaining contributions come from two of the people with whom Kathy collaborated extensively over the past 20+ years. Robert Thornberg writes from the perspective of a Professor of Education with extensive experience of research focusing on bullying and victimization amongst schoolchildren and adolescents. His contribution explains how Constructivist Grounded Theory dovetails with "the new sociology of childhood". Specifically, it aligns with Kathy's focus on the ways in which "participants' in this case children's – everyday life, shared understandings . . . experiences and perspectives [are put] at the center of inquiry." Robert and Kathy's joint writings have enhanced GTM, developing Kathy's focus on social justice and continuing articulation of the Chicago legacy of American pragmatism and symbolic interactionism emanating from the work of Anselm Strauss.

Antony Bryant in his contribution explains how he first came to read Kathy's work around 2000–2001. He contacted Kathy, and in the words of Captain Renault in *Casablanca*, "it was the start of a beautiful friendship". Kathy regarded him as a kindred spirit, and encouraged by Patrick Brindle at Sage in London, they embarked on what became *The Handbook of Grounded Theory* (2007). This landmark collection included a wide range of grounded theorists and qualitative researchers, all personally known to Kathy. When Sage approached Kathy and Tony for "an updated volume", they thought it would be far better to prepare an entirely different but complementary one, with new contributions from some of the earlier authors as well as inviting new contributors, particularly those working outside Europe and North America. Kathy was particularly pleased with this later volume, *The Handbook of Current Developments in Grounded Theory* (2019), as many chapters took up her exemplary work on social

justice issues. Kathy and Tony were also delighted that both collections included a wide range of GTM orientations, broadly representing “the varieties of grounded theory”.

In early 2020, one of the contributors to the later *Handbook*, Vivian Martin, contacted Kathy with the idea, like Jan Morse’s (2009) “Second Generation”, of trying to bring together a disparate group of grounded theorists with the aim of moving on from the rancour and suspicion that had become an unpleasant and unwelcome facet of those writing about and using the method. Kathy was, of course, fully supportive of this, and with her encouragement Vivian duly contacted a range of people who subsequently embarked upon a venture that became, initially *The Grounded Theory Coalition*, and latterly *The International Grounded Theory Alliance*. Unfortunately Kathy did not live to see this come to fruition, but their inaugural *Grounded Theory Day* on March 12, 2021, with contributions from the key “varieties” of GT, is in no small way testimony to Kathy’s unique contributions to GTM and qualitative research, and the inspiration she provided to so many.

Antony Bryant and Adele E. Clarke

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ON THE EDGES OF GROUNDED THEORY: ODE TO KATHY

Norman K. Denzin

ABSTRACT

I write my way into Kathy Charmaz' biography, offering an ode to her life-long, to project bring the mind, body, and self of the researcher, OT therapist and the chronically ill person together in the interpretive process.

Keywords: Biography; body; emotion; identity; illness; mind

PROLOGUE

I want to repay my debt to Kathy, writing my way into her scholarly biography, drawing on her experiences as an occupational therapist (OT) and ethnographic researcher (1962–1969) on a rehab unit at the University of California, San Francisco, to her pathbreaking work as the major proponent of constructionist grounded theory. Her work was always grounded in the interactions that bring the body, mind, emotions, and self of the OT therapist and the chronically ill person together in the therapy experience.

LET'S START HERE

The goal is to write my biography, my identity, my body, myself into history, to use my biography as the basis of social action, of social justice inquiry, a vehicle for connecting C. Wright Mills' (1959) concept of personal troubles to public issues, to performative representations of these connections. A goal is to reveal social injustices, and to perform new lines of action which address them (Charmaz et al., 2017, paraphrase).

We met in the mid-1980s at the annual symbolic Interactionist meetings.

Festschrift in Honour of Kathy Charmaz

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It was a friendship that lasted 40 years.
We wrote job letters for each other,
published each other's work in the journals we edited.
For 17 years she gave standing room only workshops
at the International Congress of Qualitative Inquiry.
She gave the keynote address in 2015.
She was a quiet gentle courteous scholar
and friend.
Her editor's pen made my work better.
Her 1000 word review of my 1990 On Understanding Emotion
in Contemporary Sociology came at a time when I was searching
for a new voice,
a new starting place.
Her review gave me the courage
to go forward, to experiment in
my own writing
She was a writer's best friend,
she taught writing workshops
for over 20 years at Sonoma State University.
Scores of students are better writers because of her.
guiding hand
She had healing hands,
The healing, feeling guiding hands
of the occupational therapist,
exercising hands,
performing hands
stretching bending feeling guiding hands,
bringing patient's damaged bodies
back into the mundane, symbolic spaces
of everyday life tasks
eating, shaving, bathing, toileting,
dressing, moving, walking,
one step at a time, canes, walkers,
wheelchairs
helping patients
patients better perform everyday tasks
sometimes free of pain,
some days not,

good days, bad days,

good days, bad days,

Thank you Kathy. Rest in peace

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OLDER, WISER, AND MUCH MORE DARING: ON KATHY CHARMAZ'S CREATIVE EXPLOSION C1995–2020

Adele E. Clarke

ABSTRACT

This contribution argues that Kathy Charmaz's career did not burst into full intellectual bloom until the last 25 years of her life – from 55 to her death at 80. I examine why and how this scholarly blossoming happened so late in her life and the nature of its many manifestations, especially research on a wide variety of social justice issues. After her initial focus on medical sociology, specializing in chronic illness, Kathy became an innovative and renowned qualitative methodologist, developing constructivist grounded theory (CGT) method taken up in many amazingly heterogeneous scholarly fields transnationally.

Keywords: Career; constructivist grounded theory; social justice; qualitative inquiry; research; transdisciplinarity

INTRODUCTION

The more deeply I have come to know Kathy's work, especially since she died, the clearer it has become to me that she blossomed intellectually in the last 25 years of her life – from age 55 to her death at 80.¹ This essay pursues the questions of why and how this blossoming happened so late in her life, and the nature of its many manifestations – her valued contributions to many and rather amazingly diverse fields.

Charmaz's early scholarly focus was on the sociology of health and illness, death, and dying. This era culminated, among many other impressive publications, with her book *Good Days, Bad Days: The Self in Chronic Illness and Time* (Charmaz, 1991), which won the Cooley Award from the Society for the Study of

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Symbolic Interaction. In deep ways, the research she did in these areas, including her master's thesis (Calkins, 1969) and doctoral dissertation (Calkins, 1973), generated the materials and analyses that served as exemplars for her subsequent methods work for decades. Kathy continued her research on living with chronic illness intermittently for the rest of her life, including re-interviewing key informants multiple times across many years and changing circumstances (e.g., Vann-Ward et al., 2017).

Kathy's later focus and her distinctive accomplishments on which I focus here centered on her profound reworking of grounded theory (GT) as an explicitly constructivist approach to qualitative inquiry and analysis appropriate for research endeavors in the twenty-first century. In generating some of these developments, Kathy took ideas and perspectives that were implicit in Anselm Strauss's (e.g., 1987, 1993) *constructionist* versions of GT and made them explicit.²

But in fundamental ways, Charmaz created a new *constructivist* GT that not only recognized major changes in the landscapes of qualitative inquiry and social theory over the past half century or so but also interpreted and integrated them theoretically, epistemologically, and methodologically in exciting new ways of use to researchers. Kathy deeply understood the postmodern, poststructural, and interpretive turns and their implications for dramatic changes in the landscapes of the academy. Significantly, they deeply excited her, provoking her creativity vis-à-vis generating a new pragmatist methodology.

This chapter traces the accomplishments of Kathy Charmaz in first constructing and then developing constructivist grounded theory (hereafter CGT), detailing and discussing some of them in greater depth. Two brief Interludes take up our personal conversations about creating new methods and how, years later, these led to a number of successful collaborations. Some of Kathy's key contributions to interactionism are highlighted.³ I conclude with the remarkable story of how this Festschrift came to be, ultimately a last collaboration.

A CAREER IN LATE BLOOM

Throughout her career, from its earliest to its last days, Kathy's pragmatist interactionism informed and infused her work – from her early sociology of health, illness, and death to social psychology, to her CGT, and, of course, her work on interactionism per se. Unlike many senior scholars, Kathy Charmaz's productivity did not flag later in her 50-year career, it intensified. Even more amazing, the intellectual, especially philosophical, depth of her work continued to deepen. I am arguing that Kathy did not really hit her intellectual stride until the last two plus decades of her life, c1995–2020. She was about 55 when this era began and 80 when it ended with her death, definitely a late blooming in a long and productive career. If she had had another decade, her work would have continued to deepen.

Why her career was “late-blooming” is a complicated question, only briefly engaged here.⁴ In short, I would argue that it was in part because her becoming a university-based sociologist was in her own words an “accidental” career move

away from occupational therapy – doing and teaching a very “hands-on” clinical career of direct patient care (Charmaz, 2012b, p. 52). Kathy’s leap into the academy, which she accomplished with considerable grace, was through her emergent passion for sociology ignited in her Master’s program at San Francisco State University. It was then nurtured in the Doctoral Sociology Program at the University of California, San Francisco, by her advisor Anselm Strauss and her methods teacher Barney Glaser, among others. The picture below, with Kathy at the far left, is from this very dramatic turning point in her life.



1st UCSF Graduate Program in Sociology Cohort. From left: Kathy Calkins (Charmaz); rear: Patrick Biernacki, Robert Broadhead; middle row: Betsy Robinson, Lynn Lofland; kneeling: Richard Rizzo.⁵

To become a scholar in a previously unfamiliar discipline takes time. Kathy had to grow into sociology. And after grad school, she did so at Sonoma State University under grueling and routinely demeaning circumstances. I was her colleague there c1978–1983, and we used to joke that we understood Garfinkel’s (1956) “conditions of successful degradation ceremonies” more deeply through being faculty members. These were not conditions that nurtured Kathy’s budding sociological identity, but gradually, through her own initiatives, especially through her participation in SSSI, she bloomed regardless.⁶

Regarding her writing especially, but also regarding the discipline of sociology and professional issues, in her early years as a sociologist, Kathy relied heavily on her cohort member Lyn Lofland. Lyn was married to established sociologist John

Lofland, hence knew a lot more about such things than most grad students. Kathy found Lyn's critiques of her writing immensely helpful and took them very much to heart (Charmaz, 2012a, 2012b). Kathy sought out other help with her writing, and then founded writing groups (I was in one along with Leigh Star), some of which lasted many years.

Kathy also exposed herself to the discipline by attending meetings of both the American Sociological Association (ASA) and the Society for the Study of Symbolic Interaction (SSSI) and also in some years the Study of Social Problems (SSSP), as well as special conferences. In short, she became exceptionally professionally active, thereby gleaning the mentorship and collegiality that were unavailable to her at Sonoma State. In later years, she also gleaned students and junior faculty who found in her a much needed and desired mentor. She later wrote, "A marker event in my sociological journey was receiving the George Herbert Mead Award for Lifetime Achievement in 2006 [from the Society for the Study of Symbolic Interaction]. . . I am grateful to the Society for the Award *and for creating a community in which members can flourish. . . often in unforeseen ways*" (Charmaz, 2012a, 2012b, p. 70). And flourish she did.

THE BLOOMING

In the projects we assign ourselves, I think especially in our early careers, we ideally feature the work we need to do to move ourselves forward intellectually. We may well not fully understand why we are doing something at the time, much less the implications of what we are really doing. Moreover, especially in daring to create a new approach to research, we become part of the discovery process itself, and in odd ways. We are learning as we go. We may, as Dewey said, have ideas that "just spring up, flash upon us, occur to us" (quoted in Strübing, 2007, p. 593). And this is more likely to happen if, like Kathy, we are what Leigh Star (2007) called "living grounded theory."

For Kathy, I would argue that two of the very first papers she wrote after *Good Days, Bad Days: The Self in Illness and Time* appeared in 1991 constituted the almost magical work of self-recreation that sustained her intellectually for the rest of her career. In her 1995 paper "Between Positivism and Postmodernism: Implications for Methods," and her 2000 paper "Grounded Theory: Objectivist and Constructivist Methods," (2000a) she laid the groundwork, and began developing her new method of CGT. Notably, like this Festschrift, both appeared in volumes edited by Norman Denzin.

By the 1990s, Kathy noted (Charmaz & Keller, 2016, para. 38): "The post-modern critique of qualitative research had weakened its legitimacy and narrative analysts criticized grounded theory methodology for fragmenting participants' stories. Hence, grounded theory methodology was beginning to be seen as a dated methodology and some researchers advocated abandoning it." Of course, Kathy disagreed, although she too had serious critiques which she discussed.

Always a pragmatist interactionist, Charmaz (e.g., 1995, 2000a, 2006a, 2006b, 2009a, 2009b, 2014, 2017a) was becoming increasingly constructivist. In fact,