

The Dual Meaning of Trustworthiness: How Member Checking can Promote More Rigorous and Ethical Research

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ABSTRACT

This article highlights the tension of two different meanings of trustworthiness. Researchers are responsible for being empirically trustworthy by producing social scientific manuscripts of high quality. Researchers must also be relationally trustworthy by protecting the vulnerabilities and best interests of the research participants. However, researchers often face the dilemma of attending to both types of trustworthiness without strategies for addressing the challenges. This article, co-constructed by a researcher and participant, describes how member checking can promote both more rigorous research (empirical trustworthiness) and strengthen relationships and leave participants feeling valued and empowered (relational trustworthiness). To this end, this article highlights the challenges and affordances of the member checking process itself, examines the process's impact on both the researcher and the participant, and offers guidelines for how member checking can simultaneously promote both more rigorous and more ethical research.

KEYWORDS: Member Checking, Qualitative Methods, Transactional Validity, Transformative Validity, Catalytic Validity, Participatory Research, Trustworthiness

In his collection of essays *Doing Things Together*, Howard Becker (1986) observed that he liked people to have the chance to read what he had written about them. Becker was not clear about his rationale for extending study participants this opportunity or what he expected to get out of it. Since Becker's writing 40 years ago, participant review or "member checking" has become a common feature in many qualitative research projects and it seems to have established a positive reputation among dissertation committee members, journal editors, and peer reviewers although its tangible benefits remain unclear (e.g., Buchbinder, 2011; Birt, et al., 2016; Chase, 2017; Goldblatt, et al., 2011; Kornbluh, 2015; Motulsky, 2021).

Perhaps researchers are drawn to member checking because it can promote better, more accurate research. Alternatively, maybe member checking provides an opportunity to conduct more ethical research, provided that the opportunity allows research participants to push back rather than meekly accept what the researcher has written about them. Finally, maybe member checking allows

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research participants to gain a better understanding and more control over their lives. In an ideal world, more accurate, ethical, and empowering research could be simultaneously pursued. However, in the real world, these research priorities can compete with and even undermine one another (Morse, 2015), leaving researchers to question if the benefits of member checking outstrip the challenges it is likely to surface.

In this reflective essay, we examine the social scientific and ethical benefits and potential complications of member checking. We intend to help researchers employ member checking in a way that honors research participants while simultaneously meeting the standards of social scientific research, even when conflicts and disagreements emerge. We ask two primary questions that guide our reflection. First, how can researchers ensure that they safeguard the trust people place in them when they agree to participate in research studies? Second, how can researchers maintain the social scientific integrity of the research when member checking surfaces conflict?

To answer these questions, we provide an account of how a researcher (John) and a participant (Karmin) engaged in member checking activities after a year-long field study. These activities included manuscript review, email exchange, informal meetings, and member checking interviews. The results of the member checking experience highlight the challenges and potential of this practice to establish better and more ethical research.

We conclude by explaining how this experience ultimately benefited both the researcher and the participant. Member checking has helped John, the researcher, keep concern for research participants at the forefront of his mind while pursuing social scientific standards for trustworthiness. For Karmin, the research participant, the member checking experience has provided her with insights to reflect upon. Specifically, these insights have highlighted what she termed the “struggles and celebrations” of her work life and have led to personal and professional growth.

Literature Review: The Effectiveness and Importance of Member Checking

Before turning to our primary interest, we first address member checking’s position in the field of qualitative research. Quite simply, there is no consensus about the effectiveness and importance of member checking. Despite Lincoln and Guba’s (1985) claim that member checking is the “most crucial technique for establishing credibility” (p. 314), most works on qualitative research methods mention member checking in passing, if at all (e.g., Creswell & Guetterman, 2019; Hallett, 2013; Marshall & Rossman, 2016). Furthermore, qualitative researchers rarely mention using member checking as a strategy to improve the validity of their work. We can conclude, then, that for most researchers, member checking is an optional or unimportant feature of producing a trustworthy account (Morse, 2015).

This marginal position of member checking has implications for whether researchers should even have trouble with it. Morse (2015) went so far as to discourage the use of member checking entirely. She believed that disagreements between the researcher’s depiction and the participant’s experience can put the researcher in an “awkward position” (p. 1216) and there is no clear direction for what researchers should do when disagreement emerges. She argued, as Becker (1986) did, that “the researcher’s background in theory must outrank the participant as a judge of the analysis” (Morse, 2015, p. 1216).

Morse’s conclusion about how disputes with participants should be resolved echoes Howard Becker’s (1986), who noted that researchers must “pay the price” when informants were displeased about the researcher’s account and that the researcher must “be ready to handle the situation” (p. 38). However, Becker offered no specific suggestions about how the situation could be handled. He seems to conclude that in the conflict between informant’s feelings and true and

honest social science, one must always favor the latter, otherwise the “research serves no purpose” (Becker, 1986, p. 39). For Becker, then, making his account available for participants to read was the extent of his ethical obligations to them. In his mind, Becker had a much greater obligation to the social scientific community and his own sensibilities, even if this meant offending participants and arousing their distrust or anger.

Common Experiences and Challenges with Member Checking

Since Becker’s writing, many researchers have dismissed the contention that member checking is a one-sided activity in which social scientific interests must dominate concern for study participants. These researchers have stressed that member checking should promote both research quality and research ethics as researchers use participant feedback to correct, clarify and ensure that their descriptions, analyses, and interpretations align with those of the participants while also providing space for participants to co-construct the research and by doing so, empower them. However, in practice researchers commonly fail to attain either goal (Goldblatt, et al., 2011). Despite modern researchers’ more balanced commitment, member checking remains rife with various challenges that highlight Morse’s criticisms. Member checking is riddled with social pitfalls (Buchbinder, 2011), participant disinterest (Birt, et al., 2016; Goldblatt, et al., 2011), excessive participant acquiescence (Chase, 2017), extensive burdens for both researchers and the participants (Kornbluh, 2015; Motulsky, 2021), and participant embarrassment or pain (Carlson, 2010; Motulsky, 2021). Moreover, member checking can introduce conflict between researchers and participants that threatens the entire research endeavor (Brear, 2019; Candela, 2019; Caretta, 2016; Caretta & Pérez, 2019; Doyle, 2007; Harvey, 2015; Iivari, 2018; Locke & Ramakrishna Velamuri, 2009).

Member checking, then, might not lead to “transactional” validity associated with accurately establishing social fact (Cho & Trent, 2006), but rather leave everyone involved worse off for the effort. This conclusion seems to be Morse’s main point. However, it should be noted that Morse only objected to member checking for methodological reasons and seems not to entertain ethical considerations for why giving people the opportunity to push back on what the researcher has written about them might be a good thing to do. Member checking has other goals in addition to transactional validity that might include representation, participation, personal change or “catalytic” validity (Koelsch, 2013), and social change or “transformational” validity (Cho & Trent, 2006; Thomas, 2017). While the multiple goals of member checking surfaced in recent research may be commendable, they are by no means easily achieved, as the articles cited above have made clear and, thus, the field continues to struggle with member checking’s place in conducting sound and ethical research.

The Dual Meaning of Trustworthiness

We propose yet another goal for member checking that compliments the considerations for transactional, transformational, and catalytic validity. Our main argument centers on the concept of “trustworthiness.” For the qualitative researcher “trustworthiness” takes on a double meaning and the two meanings are in tension with one another. Qualitative researchers care about the trustworthiness of their accounts in the sense that what they have written must be accurate and credible. We call this type of trustworthiness “empirical” trustworthiness (which we view as synonymous with Cho and Trent’s transactional validity). The second type of trustworthiness concerns the researcher-participant relationship. The researcher must establish trustworthiness by

protecting the best interests and vulnerabilities that the participants expose by participating in the study. We call this “relational” trustworthiness.

We fully acknowledge that ensuring both meanings of trustworthiness simultaneously is not easy. If participants read what researchers write about them, they may not like it, and when this happens researchers will find themselves in a bind between producing good and accurate social science on one hand (empirical trustworthiness) and honoring and protecting the vulnerabilities of participants (relational trustworthiness) on the other. In this way the two types of trustworthiness create a tension for the researcher that he or she must attend to.

Ensuring both empirical and relational trustworthiness will likely take considerable effort. When two forms of trustworthiness are in conflict (as they often are), researchers must walk participants through some tough moments, listen to what the participants have to say, revise their manuscripts when both empirical trustworthiness and relational trustworthiness can be mutually strengthened, hold their ground when empirical trustworthiness is at threatened, and make compromises that build relational trustworthiness when empirical trustworthiness is not undermined.

In what follows, we explain how a researcher and participant worked together in pursuit of both empirical and relational trustworthiness. Specifically, we show how achieving the dual and sometime competing forms of trustworthiness (empirical, relational) will inform and embolden research participants to take action (catalytic validity) and improve society (transformational validity).

Conducting the Member Checking Activities

Background: The Implementation Study

Karmin and John first met when John sent Karmin, then an elementary school principal, an unsolicited email about participating in a study that examined the implementation of a continuous improvement initiative. Karmin immediately agreed to participate. She sent John the following email:

Thank you, John,
I look forward to completing this important work with you. Please let me know what your next steps are and when you would like to start this process.
Thank you again,
Karmin

The next step was to set up a time for John to come visit Karmin’s school and talk to her in person, to explain his approach to research and what it would require of her and her staff, and to answer any questions. John visited and the meeting went very well. He told Karmin about his intention to conduct a field study, which meant he would be observing and, in some cases, participating in everyday life. This would involve him in routine events including attending staff meetings, walking the halls, shadowing Karmin as she moved throughout her day, visiting classrooms, and the like. He would also be interviewing Karmin and many of her teachers several times over the course of the year. Finally, he would collect and analyze the artifacts that Karmin and the teachers created. In short, data collection would be intense and would require a considerable commitment from both the researcher (John) and the research participants (Karmin and her teaching staff). During the meeting John also impressed upon Karmin that his intent was to describe and explain what he saw accurately from multiple points of view. This would include subjective accounts of experiences that culminated in some objective social facts that anyone reading the case

study could read and verify as being correct. John also insisted that his intention was to depict people as well meaning, hard-working, and competent even if conflicts arose among them when conducting joint work.

Karmin listened intently and asked a few questions throughout the conversation. Would teachers be compelled to participate? What would the final product be? Who would read it? John told Karmin that he would ask teachers to participate in interviews but would not pressure them. He would construct case write-ups based on individual participant interviews that he would send to participants for their review. He would combine the case write-ups into a single case study that he would couch in research literature and prepare for publication in a scholarly journal. He would make this case study available upon request but would not be sending it out to everyone unsolicited. John answered these questions to Karmin's satisfaction and when he left both were excited about the study.

Over the next nine months, John conducted the field study at Karmin's elementary school. He spent his time observing, interviewing, and generally embedding himself into the life of the school. Life at Karmin's school was often not easy. The continuous improvement initiative called for considerable organizational change which required a concomitant change among individuals. Change, of course, is difficult, and Karmin was committed to implementing the initiative with fidelity. To do so would require her to be assertive and directive, which aroused considerable resistance from and conflict with many members of the teaching staff. During John's time at Karmin's school there were some exceptionally joyful days, too, and by the end of the field study, Karmin and the staff had worked through most of their difficulties. Karmin and the teaching staff had used the change initiative to effect real improvement at the school and most, if not all, of the teachers felt better about the initiative and about Karmin's leadership by the end of the study. John's field study was part of a larger "efficacy" study being conducted by quantitative researchers who also worked on the project. They concluded that Karmin's school's growth in academic achievement was amongst the highest in the sampling pool of 75 schools.

Getting Started with Member Checking

After leaving the field, John spent the next several months analyzing data and writing individual cases (based only on single participant interviews). After completing each individual case write-up, he sent the write-up to each of the research participants. He always extended the opportunity for participants to meet with him if they wanted to talk about what he had written, but he did not often hear back. Individual case write-ups were quite lengthy (usually exceeding 20 pages) and expecting participants to read them and then to meet to discuss seemed like an unfair burden. No participant (except Karmin) asked to read the overall case study. While John was analyzing data and writing, Karmin occasionally reached out to inquire about the status of her case write-up and the overall case study.

Many participants do not care to read what researchers write about them, but Karmin is different. She is a highly educated, experienced, and capable woman with a keen interest in continuous professional improvement. She wants to hear news, even if it is tough, so long as the information will help her improve. John tends to be a conflict avoider. In the past, he has provided informants with their own case descriptions and, if they ask, the full case study. But he secretly hopes they decline to read it. Or, if they do read it, John hopes they do not care to sit down with him to discuss. He often sends emails with more eagerness and openness to meeting than he actually feels because he does not want to discourage informants from taking him up on his offer. He had a feeling, though, that when he sent Karmin her individual case write-up and full case study

(which she requested to read), he would be hearing back from her. He was right. On August 8th at 4:00PM, John sent Karmin the following email along with the full case study:

Karmin,
I have attached the manuscript draft. I'd love to hear your thoughts/feedback/ critiques to what I've written, if you have time to read and meet. Thanks again for all you did for this study!
John

Karmin read the case study that afternoon, and that same night at 9:00PM, she sent John the following email:

Hi John,
So great to hear from you! Yes, I just finished reading the study. Great job capturing the work we did at [Pseudonym] Elementary School. It was tough to relive some of the banter and reluctance. 😞
However, I felt you balanced leadership, management and teacher voices well. I would love to meet up sometime soon!
My office is at _____. We can grab lunch anytime! Take care and I feel honored to be part of your work! I am still learning about the science of implementation and will continue to grow my knowledge and skills to support those that entrust me to do this important work.
Thanks,
Karmin.

John delayed setting up a time to meet much longer than he should have. He put off responding and the email got buried and forgotten. When his need to respond came again to mind and pulled on his conscience, John began carefully crafting an email, but there really was no good excuse for the delay. He finally wrote the following response on November 22:

Karmin,
I'm embarrassed that it took me so long to respond. Please forgive me. I would love to come see you to catch up and talk about the study. I have since found out that your elementary school had some of the highest test score improvement of any of the schools in our study. If you're still game for lunch, please send me some dates/times that work for you and I'll come to where you are.
John

Karmin was gracious and suggested John come to meet her in her new position. She had assumed a senior leadership position in a nearby district since the study ended and she wanted John to see her new office and meet some of her new colleagues. On a cold December day, John drove 90-minutes to see Karmin's new arrangements. He looked forward to seeing her and catching up, but he dreaded having to face her and surfacing tough emotions that he knew he had caused her to relive. He could not help feeling that she would feel betrayed, that he had violated her trust (i.e., relational trustworthiness) and had used her difficult situation to further his own career. As he drove, relational trustworthiness dominated his thoughts and he scarcely worried if he had gotten the story "right" (i.e., empirical trustworthiness).

When John arrived Karmin greeted him heartily and we asked each other the questions about family and work typical of two colleagues who had not seen each other for some time. Karmin suggested they eat at a local restaurant close by. Over lunch, conversation was lively and engaging. Neither seemed tentative and the conversation was never stilted or uncomfortable. When the conversation shifted to the case study, the tone became a bit more serious and deliberate, but

things were not tense. Karmin informed John of some factual mistakes or omissions he had made in the case study, but these were minor. Overall, she agreed that the findings were accurate and represented the events that had transpired over the course of the year. John thanked her for these comments, and he returned to the idea that he was trying to represent events accurately at the same time representing people well. He explained that he made every attempt to portray her as well intentioned and capable.

However, the manuscript brought up some hard moments that John had observed or heard about during data collection. The effort to implement a new reform project brought Karmin into direct conflict with some of her teachers who found Karmin's assertive leadership style intimidating and aggressive. Karmin knew that she had disagreements with some of the teachers and she may have suspected that some had negative feelings toward her, but she had never seen it represented to her in this way. Any self-aware and reflective person would have difficulty reading the words in print. Karmin was no different.

John asked her tough questions about whether she felt personally betrayed or if she felt he had abused her trust. Karmin insisted that she did not and that, overall, the case study was enjoyable to read. She believed John had made attempts to depict her accurately and favorably. John again thanked Karmin for her openness and contribution to the study, which would not have been possible without her permission and input. John then mentioned that he had been thinking about the dual meaning of trustworthiness and the dilemma of simultaneously satisfying social scientific standards and ethical obligations that included honoring people and their work. This piqued Karmin's interest. John made an in-the-moment decision. He asked Karmin if she would like to pursue this idea of dual trustworthiness together more formally. This effort would involve a follow-up interview and writing for scholarly publication. Karmin agreed and the two made plans to talk over Zoom following the New Year. In the meantime, John sent Karmin the write up on the dual meaning of trustworthiness included earlier in this manuscript.

In January, John and Karmin sat down to talk about her experiences reading the full case study. The following includes excerpts from our conversation as we worked through the dual meaning of trustworthiness together. John began the conversation by outlining the dilemma.

John: The whole point of the paper will be how do you manage that tension as a researcher between those two different definitions of trustworthiness that seem to be in tension with one another? Because some researchers are like, "Hey, you know what? When you have a problem, you're the expert. So tough for them. If they don't like it. That's not your problem." That seems a little harsh. The other [approach] though, is erroring on the other side, which is you just amend whatever you've written to make the [research participant] happy.

John continued by drawing a parallel between this tension and the one Karmin faced as an educational leader who was tasked to balance principles and standards for educational leadership at the same time she honored and respected the people she worked with. He returned the idea that social life was wrought with these types of dilemmas and working through them could be challenging but ultimately of great value. As people work through the dilemmas in life, they make compromises and introduce conflict even if they do not realize it. John's manuscript caused Karmin to confront the compromises and conflicts in a way few people ever do. With that preamble, John prompted Karmin, "Maybe we'll just start by [talking about] your reactions to what I've just said? And you can really take it in any direction you want, and then we'll just have just a conversation about that whole trustworthiness piece."

Karmin's response revealed that she was keenly aware of the trustworthiness dilemma. She told John that:

At some point you have to take the feelings and the emotions out of it, so you don't erode the integrity of the work. You can't worry about the feeling part. I feel like you have to take the emotions out of it even though you are representing humans and people and you want to represent them in a way that isn't demeaning or demoralizing or that, but you also have a charge to do the hard work, which is represent people the way it was presented to you, right?

John acknowledged to Karmin that he was indeed “representing” the case by relying heavily on “taking your life and your actions over the course of a year and distilling it into 20 written pages.” And he pointed out that, while he hoped the case was accurate, it was not the only case study he could have written. There were multiple realities that he could have pulled out of the data.

Karmin then told John that she had been discussing this trustworthiness project with a friend and former colleague, re-enforcing to John Karmin’s interest and enthusiasm for the joint work. It also revealed her understanding that the member checking project would require a give-and-take and might include some tough moments. She said, “what I say might hurt your feelings and what you say might hurt my feelings, but at the end of the day, can we agree that there's trust and truth in what is written?” John agreed that this was precisely what he hoped to accomplish through the project—building up relational trustworthiness in addition and establishing more empirical trustworthiness.

John wanted to grow as an ethical, responsible, and accurate researcher and Karmin wanted to use the case study to reflect on her practice and to grow as an educational leader. When reflecting on the potential difficulties and benefits of talking both about the case study findings and how she felt towards John after reading the case, Karmin said:

I'm up for a challenge. I am eager to see first and foremost where I can grow from this. I want to be able to walk away with something I've learned about myself, something I've learned about the process, something I learned about building trustworthy situations and narratives for the work that I do. I work with people every day and adults and children. So I feel like it is important on my end to be able to walk away with something that inspires me to be a better version of myself.

Discussing Difficult or Challenging Moments

Once we established the fundamentals of our member checking endeavor and what we were both hoping to get out of the process, John asked Karmin about any sections of the case description that she found particularly difficult to read. Karmin responded that two sections “stood out right away.” One concerned Karmin’s selection of members for the teacher leadership team that would oversee the continuous improvement initiative. She felt like she came across as believing that the teachers whom she did not select for the team were “not important, not included, and [their] opinion didn’t matter.” In her role as a leader, Karmin had to make tough choices, and this included deciding which teachers would be of most benefit to the team and to the school. The initiative’s budget would not fund more than a handful of teachers to attend project activities and because the initiative focused on continuous improvement of early literacy practices, Karmin decided to invite regular education teachers who taught reading daily. This decision excluded physical education, art, and some special education teachers, many of whom felt excluded.

Karmin said she “didn’t realize until I read the [case study] how narrow minded I looked” and she “felt like maybe a mischaracterization” in the case study was that she was unconcerned with how her selection decision affected some of the teachers on her staff. Despite her decision to

exclude them from serving on the initiative's formal leadership team, she still believed all teachers had a contribution to make in promoting effective early literacy practices, although she admitted that her belief "probably wasn't stated" because she did not mention it during interviews.

The second difficult moment involved the depiction of how the school's leadership team selected an early literacy practice as the focus on their continuous improvement efforts. Karmin believed that John had relied too heavily on the account of one of the literacy coaches who Karmin believed "painted a picture that she just threw something out there and [the rest of the team] just globed onto it." Rather than being a result of haphazard or disinterested leadership, Karmin saw this as an example of building collective ownership and allowing the team to suggest and then decide upon a topic. She said, "as leaders we all come to meetings with [our plans] in the back of our heads with the direction we want to go and the intent behind it." Karmin was actually exhibiting restraint from imposing her will on the group because her natural inclination is to "map out" for people exactly what she expects that they will do. Exercising restraint was important and tactical because Karmin wanted the leadership team members to "figure it out...to be the ones that have a say...Whatever way we go, [teachers on the leadership team] have to own it because [they're] the ones doing the work. I'm not going to be in [their] classrooms."

Karmin concluded that these events as written were "not a huge mischaracterization," but "maybe could be improved upon." John agreed. Karmin's observations were another data point he could use to strengthen the manuscript. Importantly, however, he did not need to abandon the "haphazard" explanation in favor of the "intentional" one. Rather, he could use these conflicting explanations to deepen the manuscript's analysis. It was true that some members of the leadership team believed that the selection of the focal practice was arbitrary, but it was also true that Karmin handled the situation intentionally to foster distributed leadership and buy-in. These differing perspectives helped better explain why there were conflicts later in the year.

Of course, it was not strictly the mischaracterized instances that Karmin found difficult. Reading through the manuscript, more generally, caused Karmin to "relive" conflicts with teachers that aroused "so many emotions" that felt like exposing "raw skin at times." When trying to lead her school in continuous improvement she was constantly trying to understand teachers and the perspectives they brought to the work. She explained at length:

I was just trying to decipher really what is happening with this teacher? What is the barrier for them? What is the hangup? What is the thing that's getting in the way from them wanting to be the best version of themselves and do what's best for kids? Is it 'I don't want to work that hard'? Is it 'I don't have the skills to do that'? That was in my mind, I'm constantly trying to figure out why this is so hard? What am I asking that is pushing them so far to the union to just kind of buck the system all the way?

Reliving tough circumstances was also challenging because the manuscript overlooked some of Karmin's internal dialogue and her agonizing over teachers and why a sizable minority of them seemed to have no interest in innovative new practice. Rather, the manuscript focused most on the deliberate actions she used to get them to actively engage in implementing new instructional strategies that aligned with research informed best practices. Karmin repeatedly took assertive actions that may have been necessary, but also came across as being harsh even if they were effective. According to Karmin, the manuscript's focus made her "sound like a real bitch," although she said this with a laugh.

Discussing the Good Moments

After a lengthy discussion about challenging or hard moments and how these made Karmin feel, John asked her if there were any “moments of sweetness” that she enjoyed reliving. Karmin’s answer surprised him. She said that moment that she enjoyed reading about most involved a tense interaction with the union president, who came to the school to address some of the teachers’ concerns.

Karmin found this episode “validating” because the union president was “coming with the best of intentions to represent staff” and Karmin was genuinely interested in how the staff felt and how she could lead them better. The union president told Karmin that the staff felt “overwhelmed and underappreciated in the crunch of expectations” including those that came with the continuous improvement initiative. However, the teachers could not cite a single contract violation that Karmin had perpetrated. In fact, any specific complaints that the union president expressed were aligned with the practices that were either mandated by the district or in the best interest of children, or both.

Instead of dismissing the union president, Karmin expressed interest in addressing the teachers’ concerns to the greatest extent possible. She and the union president made wall charts that helped Karmin explain what was required of teachers and why each was important. At the end of the meeting, the union president said she was going to use what was on the charts when meeting again with the teachers. Karmin ultimately felt good about how she handled this difficult situation. She felt like she held her ground and honored her professional and personal commitments while at the same time taking the teachers’ concerns seriously. She and the union president were able to list complaints and “brainstorm” solutions that demonstrated Karmin’s interest in acting in good faith. In Karmin’s opinion, her conduct in this difficult situation was well represented in the case study. John responded by telling Karmin, “I thought you did a really nice job of balancing those two things of like, ‘we need to move forward, but I’m also going to make some concessions here. I want this to be a pleasant experience for [teachers].’”

John then asked specifically about another potentially encouraging moment in the case study when a teacher got up in front of the entire staff and explained how the school’s focus on continuous improvement in early literacy transformed her instructional practice and reinvigorated her passion for teaching.

John: What about the final scene? You get the first-grade teacher to get up there and give a testimonial. I put that in there because it was true, but I also wanted to leave it on an upbeat note of like, yeah, there was a lot of struggle, but you got to a pretty good place in the end. Did it read that way for you?

Karmin agreed that it was a good moment. She recalled that “I didn’t ask her to do that. She was like, ‘I want to stand up and share that we need to continue the work. We need to move forward.’” For Karmin, this final moment in the case study reinforced the importance of staying the course even through conflict. Ultimately, she believed, “We did get some systems rolling. We did get some protocols in place and procedures that I feel very happy about those things.”

John ended the conversation by asking Karmin if, with all things considered, she was glad she had participated in the study. Before answering this question directly, Karmin admitted that after finishing reading, the case study “was hard to relive.” Specifically, she said, “it was dreadful going through that process—not the research, your interviewing process—but reliving that system change from the beginning to where we ended.” She then added:

It’s not perfect. Do you know what I mean? I feel like you’re never going to reach the summit. We move the needle, but we never arrive. And I don’t think in school [improvement] you will ever arrive. But I don’t ever regret participating in [the research]. I feel like that was really valuable work and

for someone to be willing to capture the work, I feel very blessed to be part of it.

Writing the Manuscript

Writing this manuscript was a joint endeavor and an extension of our member checking work. After the member checking interviews, John drafted the Background, Getting Started with Member Checking, Discussing Difficult or Challenging Moments, and Discussing the Good Moments sections of this manuscript and shared them with Karmin for her feedback and input. To ensure Karmin's voice was well represented in this manuscript, John asked her to write to particular topics that captured her perspective and experiences. Meanwhile, John worked to situate our writing in the social scientific literature on member checking.

After Karmin worked through the manuscript draft, made comments, and wrote her sections, John made revisions based on her feedback and folded Karmin's writing into the manuscript while making only minimal adjustments to the writing. We then met again to discuss final adjustments and prepared to submit the manuscript for peer review after we reached consensus on the accuracy and quality of the manuscript contents.

Discussion

John and Karmin engaged in member checking activities framed by the dilemma of the dual meaning of trustworthiness. We explored the question of the extent to which it is possible, at least in this case, to provide an accurate account of the case (empirical trustworthiness) while at the same time honoring research participants and serving their best interests (relational trustworthiness).

We can draw a few conclusions from our endeavor. For instance, would the member checking activities we conducted have been worth it strictly to improve the empirical trustworthiness of the paper? The answer, at least in this case, is probably not. John made only a few minor factual corrections and rewrote the section about learning team formation and topic selection to include more of Karmin's perspective (Breer, 2019). While these modifications helped improve the paper's accuracy and quality, they did not change the paper's theoretical explanations or the implications that can be drawn from them. In short, the changes did little to advance the social scientific understanding that the paper had to offer.

Thus, one conclusion we can draw from this experience is that, while we disagree with Morse (2015) about the utility of member checking—as we believe it to be quite helpful in establishing empirical and relational trustworthiness—we do agree that member checking may be an impractical strategy if done only to establish empirical trustworthiness. Indeed, we argue that the practical problems and time investment that emerge from member checking likely overwhelm any methodological benefits because we believe, as others do, that empirical trustworthiness can be established through other means. It is only when the considerable ethical benefits are included alongside the methodological benefits that member checking makes sense.

Quite simply, we argue that pursuit of relational trustworthiness through member checking is an important way to promote more ethical research. In this specific case, member checking gave Karmin a voice in how she was presented in the final manuscript. It also strengthened John and Karmin's professional relationship and helped conclude the research project on a note of mutual respect and admiration. More broadly, this experience helped John mature as an ethical and conscientious researcher who strives for participant wellbeing (relational trustworthiness) with the same vigor with which he pursues producing research articles of high quality (empirical trustworthiness).

Member checking is important in establishing the habits of mind necessary for all qualitative researchers. Even if conducting member checking conversations is not practical in all situations, it is important to engage in member checking work periodically to ground qualitative researchers in the ethical concerns that they might otherwise find inconvenient. Based on his interactions with Karmin, John asks himself the following set of questions after completing a manuscript when he is not conducting more formal member checking activities:

- Have I depicted the participants' perspective and explained how their lines of conduct flowed from how they viewed their situation?
- Have I collected enough data to represent participants well and depict them as well-intentioned, competent, and caring individuals? How do I know?
- What might a participant's objection be if they read this manuscript? How would I handle these objections?
- What evidence do I have that I have depicted the participants' conduct as graciously as possible while still relaying events accurately?
- Have I handled participants' vulnerabilities as carefully as possible? Is this paper honoring them while still being accurate?
- After reading this paper, would participants be glad that they had participated in the study? What evidence do I have to substantiate this conclusion?

Asking and answering these questions helps remind John that he is researching substantive areas through building his understanding of the social world by interacting with people who have little or nothing to gain from their participation. Member checking in the way we have described here is one way to ensure that equitable treatment of research participants stays at the forefront of researchers' minds. Participants in research studies, particularly if they are field studies, place their trust that researchers will handle their vulnerability with care. If researchers focus only on empirical trustworthiness, they may begin to think of relational betrayal as a necessary tradeoff in pursuit of social scientific knowledge and validity as traditionally understood. Researchers can begin to believe that being unconcerned about the well-being of those who give of their time so graciously is a necessary occurrence in the pursuit of good research.

The member checking also had tangible benefits for Karmin that left her believing that her best interests and trust had been well protected (relational trustworthiness). She also felt more empowered (transformational validity) and prepared for action (catalytic validity). First, Karmin concluded that participating in the field study was one of the best educational engagements that she has ever experienced. This positive experience started early in the project. Karmin's eagerness to participate stemmed from the honor she felt that John or any researcher would take the time to gain real insight into the intricacies of public education and school improvement. Thus, Karmin's trust in John was instant, and she was not afraid that he would see or capture anything that was not truly heartfelt on her part. Karmin reflected:

Were there tough moments? Yes, absolutely! John witnessed many of my most vulnerable moments in my struggle to establish a new normal. From my attempts to foster a growth mindset or alter a fixed mindset, to a new way of teaching and learning. When John talks about my statement of reliving the hard, it was just that, as I lifted his words from the page and digested what he had witnessed, or how others' interpreted my expectations. However, some of the greatest tangible benefits for me were seeing myself through the eyes of others without a filter.

Thus, even though member checking had some difficult moments, the experience left Karmin feeling that her work was important enough for serious scholarly interest and she felt

honored and respected by the case study. She also gained a better perspective of her work and could see her actions from another point of view in ways she had not been able to previously.

Second, Karmin felt more empowered (transformational validity). Through the member checking process, Karmin gained greater insight into her own dilemma that mirrored John's concern for empirical and relational trustworthiness. Specifically, Karmin learned about how others perceived her and how she attempted to build and sustain good relationships with teachers at the same time she upheld professional standards. She held strong beliefs that quality principal leadership meant that she would remain focused on what was best for students. She thought if she led her school with students' best interest at heart, then she would fulfill her professional obligations. Consequently, she believed that if her decisions were centered around the students' needs then she could accept or tolerate the pushback from teachers on staff, because at the end of the day, she saw her role as centering on advocacy around students. She was also committed to empowering her teachers to be reflective and growth-minded, so they could in turn be the best version of themselves for their students. The member checking process provided Karmin with greater insights into how her dual priorities of student-centered school change and care for teachers were sometimes in conflict and encouraged her to reflect on how she might learn and grow from this new understanding. Seeing the conflicts that she aroused with teachers in the context of maintaining her principled commitments through trial left her feeling inspired and empowered.

Finally, Karmin was better prepared for action (catalytic validity). Member checking afforded Karmin the opportunity to view her work more conceptually and she could translate this understanding into acute improvement of her professional practices (Koelsch, 2013; see also Glaser, 1978). She appreciated John's ability to capture her use of the cooperation tactics she employed with teachers during the study, which included avoiding coercion, providing transparency, alleviating teacher workload, affirming teacher practice, simplifying expectations, establishing an improvement narrative, and avoiding formal punishments, which she believed to be her strengths. At the same time, she also acknowledged her struggles as well as her celebrations and all the areas in-between as opportunities to encapsulate a better version of herself.

As noted, Karmin assumed a new position after the conclusion of the implementation study. In her current role, she oversees the implementation initiatives at the district level, so she remains hopeful that her next "cycle of implementation" will be a little less bumpy for the teachers and her leadership team as she continues to reflect on her practice and grow her knowledge and skills around implementation science. After the member checking experience, Karmin remains a "seeker of feedback" who wants to continue to grow as a leader and to be viewed as someone who is credible, knowledgeable, supportive and who will truly engage in hard but meaningful work with colleagues.

Conclusion

We conclude with a few ideas about what prevailing conditions made this a productive, even if sometimes difficult, endeavor. First, and probably most importantly, Karmin is a strong minded professional with a commitment to learning and self-improvement. While there are always some power differentials between the researcher and the researched (after all, John was wielding the pen) these differentials were less pronounced because of Karmin's high position.

Second, John knew Karmin well enough to suggest they review the case study together and write about the member-checking experience. Not everyone would appreciate, benefit from, or enjoy this experience. While John could not guarantee that Karmin would actually benefit from transitioning from informant to co-author, he knew enough to expect that she would.

Third, both John and Karmin had an interest in writing about this experience. Member-checking in the way John and Karmin conducted it is really time- and resource-consuming. At the same time, conducting the member checking interviews in the way we did was invigorating at least in part because we knew that these activities were leading to discovery that we could then distill into a publication. We both found the idea of a co-authored journal article exciting both individually and because it would strengthen our professional relationship.

Fourth, Karmin was the key informant participant in the study. Much of the action in the study centered around her decision. While there were other key players who might have had something to contribute to improving the manuscript, this would not be true of all the people John interviewed and observed.

John and Karmin continue to enjoy a strong professional relationship, and the member checking work they conducted strengthened the relational trustworthiness shared between the two and the empirical trustworthiness of the manuscript John ultimately submitted for publication. However, despite this success, researchers should exercise caution when employing the member checking practices described here. These practices likely work best when the participant is in a professional role, the study focuses on professional conduct (as opposed to say, emotional or psychological trauma or other charged experiences) and the participant has a track record of competence and strong desire for feedback and continued professional growth. Under these rather specific conditions, member checking through continued dialogue can be a powerful and rewarding experience.

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Karmin Bourdo brings over 23 years of experience in public education, including 15 years in the classroom spanning grades K–12, where she developed a strong foundation in instructional practice and student-centered learning. She spent five years as a building principal, leading a dedicated team of educators, with a focus on building culture and improving outcomes for all learners. She currently serves as Director of Instruction, supporting Hopkins Public Schools District. In this role, she coordinates state and federal programs and grants, guides K–12 curriculum implementation, and supports multilingual learners and families experiencing homelessness.

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