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# A Dynamic Process Model for Finding Informants and Gaining Access in Qualitative Research

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**Abstract**

This article surfaces some of the emotional encounters that may be experienced while trying to gain access and secure informants in qualitative research. Using the children's game of hopscotch as a metaphor, we develop a dynamic, nonlinear process model of gaining access yielding four elements: *study formulation with plans to move forward*, *identifying potential informants*, *contacting informants*, and *interacting with informants during data collection*. Underlying each element of the process is the potential for researchers to re-strategize their approach or exit the study. Autobiographical stories about gaining access for our PhD dissertation research are used to flesh out each element of the process, including the challenges we experienced with each element and how we addressed them. We conclude by acknowledging limitations to our study and suggest future and continued areas of research.

**Keywords**

qualitative research, personal experience methods, ethnography

Gaining access involves finding and securing participants for research; it is "a prerequisite; a precondition for the research to be conducted" (Burgess, 1984, p. 45). Although gaining access is an essential step to conducting research, there are limitations to the way it has been conceptualized in the social research literature. For example, it is often depicted as no more than an administrative hurdle that precedes "the 'real' research" (Crowhurst, 2013, p. 463), which entails collecting and analyzing data and writing the report. While gaining access might appear direct, even this "simple"

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stage of the research process can be fraught with challenges that rarely make it straightforward (Cole, 2013). Our study explores these challenges, revealing the uncomfortable and difficult experiences that researchers may encounter when trying to gain, secure, and maintain access as well as what happens when attempting to gain access fails. In this article, we use our personal stories of gaining access for our doctoral dissertations as direct sources of empirical material from which we develop a nonlinear process model yielding four elements: *study formulation with plans to move forward*, *identifying potential informants*, *contacting informants*, and *interacting with informants during data collection*. In doing so, we focus on the dynamic and often poignant encounters between researchers, gatekeepers, and (potential) participants.

We problematize the general assumption that gaining access is a "simple" activity by exposing and examining our own uncomfortable, ambivalent, and awkward encounters during this research process. As a result, we offer two contributions to the existing literature. First, using the metaphor of hopscotch, we develop a dynamic process model that enables us to theoretically conceptualize how access is negotiated, established, and maintained. By offering a nuanced understanding of the dynamic nature of gaining access, we broaden the conceptual and methodological scholarship about this process, which often takes a mechanistic, "tip-giving" approach. Instead, we highlight the perpetual risk of rejection throughout the process of gaining access and emphasize the importance of re-strategizing. Second, we focus on the challenges of gaining access in qualitative research, using personal stories from our doctoral dissertations, and thus answer Okumus, Altinay, and Roper's (2007) call for more exposure of researchers' experiences and struggles with obtaining access at various career stages.

The article is formatted as follows; we begin by discussing how gaining access for qualitative research has been addressed in the existing literature, identifying along the way the gaps, which our study endeavors to address. From there, we discuss our methodological approach and develop a dynamic hopscotch model of gaining access using our own access stories. Our process model is unique in that it highlights key challenges with gaining access and explores ways to creatively re-strategize to combat rejection, which may occur during each juncture of the process. We discuss key themes within each element and conclude by detailing some limitations to our study and areas for future research.

## Literature Review

### *Gaining Access: An Overview*

Recently, scholars have begun to criticize depictions of negotiating and maintaining access for qualitative research as a straightforward, tactical feat and focus instead on the emotional aspects, tribulations, and complexities implicated with gaining access (e.g., Crowhurst, 2013; Locke, Golden-Biddle, & Feldman, 2008). To do so, researchers have turned a reflexive gaze on their own experiences with gaining access, focusing on their identity, position, and relationships in the field (Cunliffe & Karunanayake, 2013). For example, Okumus et al. (2007) contend that the existing literature simplifies the process of gaining access and skirts critical issues that need to be considered. As such, they discuss their personal experiences of facilitating and maintaining access with gatekeepers, informants, and researchers in three different international tourism organizations. Their personal experiences suggest that gatekeepers should not always be conceptualized as "controllers" (Okumus et al., 2007, p. 13) but also facilitators into the research process. Moreover, it is critical that both the researcher and gatekeeper develop rapport and trust—neither of which is "established overnight" (Okumus et al., 2007, p. 14).

The existing literature emphasizes the vital role of gatekeepers and informants in negotiating and gaining access. Gummesson (2002) and Lee (1993), for example, suggest that gatekeepers enable

access, monitor, and control the activities of the researcher throughout the data collection process. Gatekeepers may introduce the researcher to valuable informants, but they may also halt the access process, try to expedite findings, or anticipate reports that they hope to be beneficial to their organization (Gummesson, 2000; Okumus et al., 2007). Similarly, Crowhurst (2013) explores gaining access, drawing on her ethnographic work about migrant prostitutes in Italy, but does so while problematizing the mechanistic depictions of the gatekeeper as a static figure that needs to grant approval for entry. She suggests that while the gatekeepers in her study may have opened the proverbial entry gate to informants, the complexity of the relational aspects involved in the process go well beyond what models of access currently address. Researchers may also find themselves in a weak position when trying to gain access because they have few bargaining resources to "get in." (Lee, 1993; Okumus et al., 2007). When this is the case, they must exhibit a variety of interpersonal skills and competencies such as trust, rapport, sensitivity, knowledge, and experience (Dundon & Ryan, 2010). Overall, while gatekeepers may help with granting permission to make contact with potential informants, they do not necessarily guarantee that informants will accept the researcher or that they will be fully cooperative (Clark, 2010; Wanat, 2008).

The dynamic role of researchers has also been considered in relation to informants and gatekeepers. For example, using the metaphor of "working the hyphens," Cunliffe and Karunanayake (2013) reveal the complexity of the researcher's relationship with themselves and others against the backdrop of fieldwork at a tea plantation in India. They suggest that research is influenced by more than field research decisions, thus exploring the political and agentic aspects at the intersection of researcher-researched. Thus, gaining access requires an ongoing and careful balance of patience and persistence as neither researcher nor research participant is in full control of the process (Crowhurst & Kennedy-Macfoy, 2013; Feldman, Bell, & Berger, 2003).

## *Gaining Access Process Models*

Access is not just a line that is crossed once but an ongoing and fluid process that is experienced many times over throughout the research process (Crowhurst, 2013; Crowhurst & Kennedy-Macfoy, 2013). The role of gatekeepers, informants, and researchers as well as the steps and stages of gaining access have been considered in a series of process models. For example, Buchanan, Boddy, and McCalman (1988) identify a four-stage process model of access: getting in, getting on, getting out, and getting back. Relatedly, Johl and Renganathan (2010) develop a framework for gaining access, drawing on both Buchanan et al.'s (1988) and Laurila's (1997) work on access. Based on the different stages involved in conducting research, Johl and Renganathan (2010) identify various steps to successfully gain access via formal and personal access routes. While these frameworks are helpful in developing an understanding of gaining access, this process is still presented in a neutral, nonproblematic manner that overlooks the political and complex encounters between researchers, gatekeepers, and informants.

One explanation is that despite being a complex process, gaining access is often depicted in a mechanistic manner rather than in a dynamic way. Often, the result is a neutral "tip-giving" approach to help researchers get in and get on (Buchanan et al., 1988) with their research—one that overlooks the intricacies of this important process. Another explanation is rooted in the veil of secrecy surrounding data collection and analysis procedures (Decrop, 1999). For example, researchers may experience feelings of confusion, anxiety, impatience, and uncertainty as they face access challenges. However, they are expected to keep a lid on emotions arising from awkward encounters—what Koning and Ooi (2013) identify as invisibilities in published research arising from the hegemonic, institutionalized pressures that blanket the political landscape of academia. This results in researchers following the unwritten rules of the field to present objective observations with authority while masking failures and doubts.

We contend that while existing process models serve as a useful heuristic, they continue to portray the process of gaining access as linear and relatively unproblematic. As such, we join others (e.g., Crowhurst, 2013; Okumus et al., 2007) in emphasizing the need to shed light on the obstacles and intricacies of gaining access. Further, we build on Feldman et al.'s (2003) metaphor that the process of gaining access resembles walking down a long hallway with many doors:

> Some of the doors are open; some are closed. Some of the closed doors open periodically in response to a variety of different actions; others will only open if you say or do the right things. Some of the doors lead to rich environments where there is much to be learned; other doors lead to vast empty rooms that contain little of interest to the researcher. Some of the doors may open but lead to spaces behind the doors that do not provide further access. Doors that open sometimes close, occasionally for no discernable reason. Conversely, a door that was closed may open just enough to allow one to get one's foot inside. Not all doors are completely open or shut. There is a range of in-between. (Feldman et al., 2003, p. ix)

In this study, we want to go beyond Feldman et al.'s (2003) long hallway metaphor to capture the complexity, ambiguity, and oscillating nature of the process of gaining access. It is important, then, that we move away from notions of the single door that can easily be opened and closed to embrace the idea that gaining access is like navigating a long (oftentimes dark) hallway that may be fraught with difficulty and uncertainty. We build on previous research concerning process models of gaining access (e.g., Buchanan et al., 1988; Johl & Renganathan, 2010), infusing it with Koning and Ooi's (2013) work on awkward encounters, to present a dynamic process model of gaining access—one that embraces the multilayered nature of this important step in the research process. This article contributes to the existing literature by exploring not only how access work is attempted but also how failure might unfold. In doing so, we go beyond highlighting challenges to suggest ways to handle failure arising from either personal roadblocks or organizational rejection. Beyond that, we stretch and problematize static views of gatekeepers as controllers of access and illustrate how, depending on organizational structure, informants and other intermediaries can act as access conduits. Okumus et al. (2007) describe the research process as a "dynamic game" (p. 25). Using this as inspiration, we suggest that gaining access is a dynamic game of hopscotch that requires flexibility and balance. Further, because little has been written in this area in terms of the experiences of doctoral students and early career scholars, we share personal experiences from our doctoral research to conceptualize a nonlinear and dynamic process model of gaining access. In doing so, we critically reflect on our actions and reactions to gaining access, exposing our own uncomfortable, ambivalent, and awkward encounters. We also illustrate our attempts to circumnavigate these challenges in order to get in and get on with our doctoral research. In the following section, we elaborate on our methodological approach, providing context as to who we are as researchers before using our experiences to illustrate each element of our conceptual process model.

## Research Approach

### *Research Context: From Chitchat to Autobiographical Stories*

In this section, we provide some context about who we are and what our dissertations are about. The first author, Amanda, studies human resource management. At the time of writing this article, she was in the third year of her doctoral program and was still in the process of organizing her dissertation topic and considering participants. Amanda's dissertation explores the work experiences of yoga teachers. Originally, her committee approved an interpretive study focusing on how yoga teachers assign meaning to their career experiences; however, her committee was subsequently

reformed, and her work now examines how concepts such as career and career calling are socially constructed artifacts that are produced based on the ontological, epistemological, and methodological framing of the research agenda and subsequent interpretation of the data. Her autobiographical experiences about the process of gaining access appear in her dissertation's methodology chapter.

At the time of writing this study, the second author, Nadia, was in the last year of her doctoral program in human resource management and was in the final stages of writing her dissertation, which shows how expatriates situated in the United Arab Emirates experience and cope with career boundaries. In her final chapter, Nadia addresses the difficulty of gaining access, reflecting on the story she shares in this article as part of the reflexive process of pursuing her dissertation to completion.

The third author, Sara, while working on this study, was in the fourth year of her doctoral program in management and entrepreneurship. She had just started fieldwork for her dissertation, which explores entrepreneurial processes in the creation of artistic work. Although Sara initially hoped to pursue a phenomenological study of arts entrepreneurs, such as tattoo artists, she was not able to gain access to this sample. She still plans to explore her experience and struggles with the research process in the methods section of her paper, now framed as a multi-sited ethnography, particularly in a section dedicated to exploring her abductive (and reflexive) approach to the research process.

Amanda's story serves as the pre-text, illustrating how the project materialized:

> The three of us were sharing a room at the 2013 Academy of Management conference in Orlando, Florida. I was late for a group dinner, and was quickly changing my shirt. Sara, just back from a session, was watching television and glanced over and saw a small, black and white tattoo on the left side of my ribcage. Upon noticing it, Sara revealed that she was also considering a tattoo because she believed it would help her gain access into a tattoo parlor so that she could begin her doctoral research examining tattoo artists as creative entrepreneurs. Her reasoning startled me. Sara was considering permanently tattooing her body because she believed it would help her research.
>
> Later, I shared Sara's story with Nadia, reflecting on the lengths that Sara was willing to go in order to secure her sample. I anticipated that Nadia would also be riddled with disbelief. But she wasn't. Instead, she shared her own personal story of tolerating overzealous male accountants in the Middle East to secure her sample for her doctoral research. What became apparent was that we all had stories about the lengths that we would go and the boundaries we would consider crossing in order to get in and get on with our dissertations. (Amanda)

This study was guided by questions such as, "While attempting to gain access, what were our difficult and uncomfortable experiences? What were the lengths we were willing to go to find research participants, and how did we feel about it?" With these research questions in mind, each of us went back to our field-notes and chose to elaborate on one experience that we personally thought addressed these questions. From there, we crafted a short, 500-word story to accompany our field-notes, illustrating what happened during our access experience and how we felt about it. As we introspectively reflected on our actions and interactions with others while attempting to gain access, we "become the subject of [our] own investigations" (Reinharz, 1979, p. 354). Thus, our focus is on "the personal voice of a situated author with a story to tell" rather than on the "omniscient voice of science" (Van Maanen, 1998, p. xxiii). Taking an approach akin to what Reinharz (1979) terms *experiential analysis*, we share and analyze our intimate interpretations of the process of gaining access through our stories, paying particular attention to the interplay of experiential (and reflexive) "data" and the situation itself.

We detail our personal experiences as stories, using Boje's (1995) conceptualization of story as an "oral or written performance involving two or more people interpreting past or anticipated

experience'' (p. 1000). Stories provide a way to articulate our experiences while reflecting on the meaning we assign to ourselves and others during this dynamic interplay (Corey, 1996; Gephart, 2004). According to Boje (1995), stories linger without concretized beginnings, middles, or endings, and they create space for multiple meanings and interpretations. People tell stories as a way to enact an experience (Browning, 1991). Unlike life-history accounts, which are prompted by another person, autobiographical stories are self-initiated, giving autobiographers the ability to create their narratives at their own pace and thus allowing them to examine particular and finer details (L. C. Watson & Watson-Franke, 1985; T. J. Watson, 2009).

From our point of view, our autobiographical reflections go beyond providing descriptions of critical events and enable us to share our ''emotions, thoughts, and interpretations'' (Chase, 2008, p. 65). They act as a means for making sense of our experiences and organizing information about ourselves (see Baumeister & Newman, 1994; Baumeister, Stillwell, & Wotman, 1990; Gergen & Gergen, 1988; Ross, 1988). Our field-notes and stories reflect and reveal the challenges we encountered and how we felt while trying to gain access into communities of study for our doctoral research. By telling our stories, we ''lift the veil of public secrecy surrounding fieldwork'' while sharing the '''unspeakable, private, and too often hidden dimensions' of the qualitative research process as a social and personal act'' (Van Maanen, 1988, pp. 83, 91-92). In doing so, we also steer away from interpreting our experiences with the binary lens of ''good'' or ''bad'' and instead embrace potential rejection and subsequent re-strategizing as critical junctures in the gaining access process.

### *Data Analysis: Toward a Process Model of Gaining Access*

We thematically analyzed one another's autobiographical stories, individually, using a technique that allowed us to identify key themes based on their recurrence, repetition, and forcefulness (Owen, 1984). Then, we further examined overlaps, which helped with organizing the elements of our process model. Doing so allowed us to ''unpick some of the implications of the stories that might not at first sight be apparent'' (Beech & Sims, 2007, p. 293) as well as to unveil larger plot structures at play—namely, the elements of gaining access as well as the themes relating to rejection and to re-strategizing access. Throughout this process, we engaged in a ''living conversation'' (Cunliffe, 2011, p. 665), facilitated through biweekly Skype conversations that allowed us to (re)interpret one another's stories while (re)assigning meaning to particular interpretations that came to us as a surprise (see Locke et al., 2008). This methodological approach enabled us to analyze the meaning of our own experiences as well as of the others and, subsequently, to develop a process model of gaining access, which we illustrate in the next section. It is important to note that our purpose was not to create empirical generalizations based on our sample of three. Instead, we followed Yin's (2003) idea that by focusing on extreme cases, we might be able to generalize to themes rather than to populations.

## Stories of Access

In this section, we share the results of our study. We start by outlining the four elements in our hopscotch model of gaining access (Figure 1), using excerpts from our field-notes and stories to flesh out each element. Table 1 summarizes our model's elements, their conceptualization, key features, challenges, and resolutions. To explain our process model, we highlight our resilience throughout the many challenges we experienced and emphasize how we re-strategized our approach many times over to get on with our research. We conclude this section by discussing key themes that relate to the process of re-strategizing access, including the potential for exiting the study.

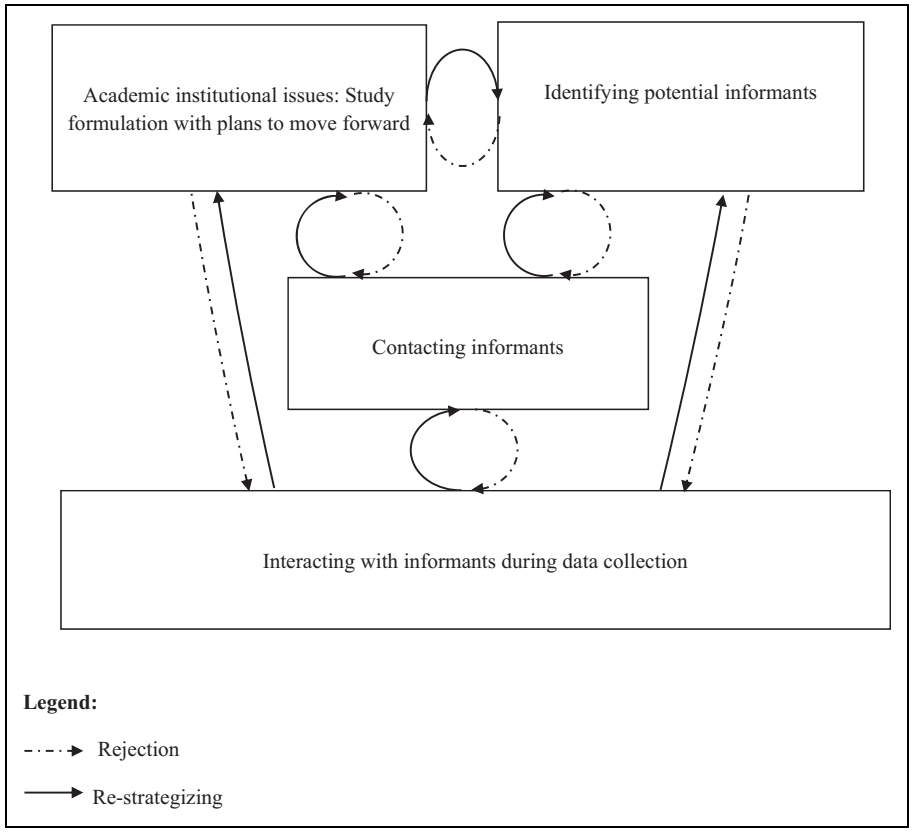


**Figure 1.** A dynamic hopscotch process model of gaining access.

## *Academic Institutional Issues: Study Formulation With Plans to Move Forward*

This element captures the organizing of the research study and involves resolving preliminary issues that may arise prior to—or outside of—the solicitation of informants. It is a necessary step in order for the study to move forward, and it includes conceptual development, gaining supervisor support, securing the necessary funding, and overcoming such emotional hurdles as overconfidence or trepidation. This is illustrated by Sara's story:

> This step had to be approved by my advisor. And it was the result of several months of research, reflection, and discussions with him on how I could potentially "make a contribution to the entrepreneurship literature." Given my background as a performing artist, we agreed that it would make sense to combine the fields of the arts and entrepreneurship—we both felt that a contribution could be made here and that my background could be advantageous in gaining an in-depth understanding of arts entrepreneurs. (Sara)

The support from her supervisor helped her feel a sense of confidence early within this element, which in turn led to feelings of excitement. In addition to gaining support from her committee, she was awarded a fellowship that financially helped her get started on the study. She was also content to have found a topic that would allow her to bring her interests in the arts together with her research interests in entrepreneurship. Later in the element, however, Sara felt underprepared because she had

**Table 1.** Dynamic Process Model of Gaining Access: Rejection and Re-Strategizing.

| Elements | Conceptualization | Key Features | Challenges | Resolutions: Re-Strategizing or Moving Ahead |
|---|---|---|---|---|
| Academic institutional issues: Study formulation with plans to move forward | Concerns issues that are extraneous to the solicitation of informants but that are necessary for a study to be conducted and for access to be sought | • Making decisions about the scope of the research study to enrich its theoretical contribution<br>• Attempting to get buy-in and support from key stakeholders (e.g., dissertation committee members, ethics review boards, research grants committee members) | • Lack of strategic organization due to pace of project; may result in over/under-preparation<br>• Emotional response: Over/undue-confidence, excitement, and trepidation around getting buy-in | • Strategic project management to help garner confidence and to outline study objectives, including theoretical contribution<br>• Creative adaptability and flexibility<br>• Building rapport with key stakeholders to bolster support<br>• Accepting that the current plan may not be working and aborting attempt to gaining access |
| Identifying potential informants | Entails associating a study with a pool of informants that may be potentially generative | • Narrowing down and deciding on a potential pool of informants | • No "clear"‘ way on how to proceed: Many options and viable opportunities may lead to confusion<br>• Inexperience versus over-preparedness<br>• Anxiety in anticipation of approaching individuals | • Openness to ambiguity<br>• Finding impetus to move on<br>• Accepting that the current plan may not be working and aborting attempt to gaining access |
| Contacting informants | Addresses the different ways through which researchers may approach informants | • Finding someone the researcher already knows<br>• Finding an informant "cold-turkey" (a stranger)<br>• Finding an informant through a go-between/gatekeeper (an intermediary) | • "Insider" status: Emotional turmoil associated with pressuring family/friends; overreliance on personal networks<br>• "Outsider" status: emotional turmoil associated with lack of rapport and shyness | • "Creative desperation": Adopting alternative (sometimes unconventional) strategies to "get in"<br>• Knowing how far one's willing to go<br>• Reciprocity: Persuading informants/gatekeepers by |

*(continued)*

**Table 1.** (continued)

| Elements | Conceptualization | Key Features | Challenges | Resolutions: Re-Strategizing or Moving Ahead |
|---|---|---|---|---|
| | | | • Poor response rates and participation<br>• Respect for others' time while trying to meet personal deadlines<br>• Ability to demonstrate credibility<br>• Decisions of when and how to request informed consent | emphasizing potential study benefits<br>• Building trust and rapport; waiting and being patient<br>• Coming to terms with failure and learning from mistakes<br>• Accepting that the current plan may not be working and aborting attempt to gaining access |
| Interacting with informants during data collection | Involves meeting with informants and collecting data based on the study's methodology | • Arranging to meet with informants<br>• Getting informed consent<br>• Studying participants | • Undermined authority of researcher: Gender dynamics<br>• Struggling with role of researcher: Imposing oneself on others as researcher (vs. colleague/ friend)<br>• Scheduling and logistics: When, where, for how long, and how often will the interaction take place<br>• Informed consent: Informants may hesitate to enroll in the study once they hear about the parameters of the study | • Preparing, as much as possible, for informants' potential actions (or inappropriate advances): Knowing what's acceptable, avoiding surprises<br>• Setting boundaries for role of researcher while maintaining professionalism<br>• Flexibility and compromise to accommodate informants' busy schedules<br>• Ensuring reciprocity—highlighting the benefits of the study, making it important for them<br>• Accepting that the current plan may not be working and aborting attempt to gaining access |

no prior experience gaining access to research sites on her own. To counter this feeling, she read as much as she could on the process as a means to prepare for the next elements.

Nadia's field-notes also reveal a sense of confidence, which came in part from her previous employment experience in an accounting firm, prior to enrolling in her PhD program. Based on her perceived "insider" knowledge, she believed that gaining access would be easy. However, Nadia reflected on this experience differently in her story:

> Looking back, I wish I wasn't so overly confident and took some time to consider that just because I may have been an "insider" in my prior firm, I was no longer the HR manager there. In fact, I was now an outsider—a researcher who wanted to "look into" a group of individuals I was no longer part of. I wish I had thought this through a bit more versus assuming that my identity as "an accounting firm employee" would give me access to a group of individuals. (Nadia)

While Nadia considers her "outsider" status as being an obstacle in gaining access, it appears that her overconfidence and her "not thinking this through a bit more" was also a pitfall in her research process. Nadia's incessant rush to get access and get the PhD done is further demonstrated in another excerpt from her story:

> *"The Best PhD is a finished PhD"* ... this thought constantly picks my mind—like little water droplets falling ever so softly, yet torturously on my forehead. When I think back to my 3 months of data collection in Dubai, I realize that like every other stage of the PhD process, my goal was to jump over this particular hurdle, and get the job done. (Nadia)

Nadia's story is one of eagerness. With data collection taking place in Dubai over the summer months, Nadia had additional pressure to interview informants within this timeframe. However, Nadia's field-notes reveal that in hindsight, she had rushed into the study without fully understanding its requirements: "I wish I was not so overzealous and so quick to jump into accessing my sample without determining who I wanted to study, what I wanted to study, and why. I was just too keen."

Amanda's field-notes reveal a different experience in trying to define the boundaries of her study and get buy-in. Although she had already located a potential community of study—the yoga studio where she was doing her own yoga teacher training—Amanda still needed to get approval from her PhD supervisor on the new idea. She had already been working on organizing the boundaries of a different dissertation when she made the decision to switch topics. This is illustrated in the following excerpt from Amanda's story:

> Would the facade of being a yoga teacher in training help to elicit good data? Could this replace my dissertation topic, I wondered? My original topic was an ethnography exploring the lived experience and ethics of a creative industry. This would be a departure, one I would have to work up the courage to sell to my committee. But it felt substantial on the page and worth the discussions and the year of rework it would take to get up to speed. (Amanda)

When she worked up the courage to make the phone call, Amanda was nervous and lacked confidence. This anxiety was connected to changing topics because her supervisor had really liked the previous idea, given that he too worked in that research area.

In sum, the *study formulation with plans to move forward* element of our hopscotch process model concerns issues that are extraneous to the solicitation of informants but that are indeed fundamental for a study to be conducted and for access to be sought (Table 1). During this element,

the challenges we experienced and our responses to them varied significantly, but the core aspects were similar for each of us. We experienced pressure to decide the scope of the research study while ensuring that it offered a theoretical contribution to help get buy-in and institutional support. In our case, buy-in largely meant approval from our dissertation supervisor and committee members, who within the North American business school landscape also assist with the conceptualizing and "ironing out" of research questions, provide technical expertise and moral support, and help out with administrative duties such as ethics applications. In other research projects, buy-in may include gaining approval from co-authors and ethics boards or being awarded financial awards (e.g., grants). As we worked on defining the boundaries of our dissertations, our supervisors were integral players—custodians of our ability to proceed with the study. Further, this element of the process model is not without challenges. For instance, researchers may find themselves engaging in under- or over-preparation due to a lack of strategic pre-planning and organization due to the pace at which the project is unfolding; this in turn may elicit extreme emotional responses, such as over- and under-confidence, excitement, and trepidation. We believe that such challenges may be resolved through strategic project management, along with a willingness to creatively adapt and be flexible to the unexpected.

### *Identifying Potential Informants*

Within this element of gaining access, researchers choose the specific social world into which they hope to gain access. For Amanda, deciding on the potential pool of informants acted as the impetus of her research project. From there, she needed to secure support and define the boundaries of the study, illustrating that in her case, this element actually unfolded before the *study formulation* element. Having immediate access to a community motivated Amanda to want to study yoga teachers in training. In a later element of the project, she decided against using her cohort of yoga teachers in training and had to re-strategize, but the initial conceptualization was influenced by her practical experience. Her field-notes reveal:

> It was a Sunday evening at about 8, with an hour of yoga left for the night, when it dawned on me that I could study them. I was perched on a bolster, an uncomfortable cylinder pillow on top of my yoga mat. Here I was, 2 months into an 8-month yoga teacher training program that consisted of formal group instruction Friday, Saturday, and Sunday evenings every other weekend. On this particular evening I found myself droning out the instructor's lesson and, instead, focusing on the 25 students that were sitting in horizontal lines, on their bolster pillows, with their pencils in hand, scribbling notes related to postures. And there I was, scribbling notes about them. Who were these people, I wondered? Why were they here? What were they hoping yoga teacher's training would give them? (Amanda)

With this arsenal of research questions flooding her mind, Amanda felt excited, clear, and inspired. She felt lucky to have stumbled on the idea to study yoga teachers and their nonstandard career arrangements.

For Sara, once the boundaries of the study were defined and she had support from her dissertation supervisor (*study formulation*), she was then tasked with determining whom to include or omit in her study (*identifying potential informants*). To do so, she took a "funnel-approach"—namely, she narrowed down potential targets from a broad social group to a smaller target in a succinct and organized way. In her story, Sara describes the process of narrowing down potential participants to tattoo artists:

> I did an extensive search on arts entrepreneurs in Missouri, eventually narrowing it down to 10 types of arts entrepreneurs in the area. Then, given my own personal interests, I ranked my

> top choices and eventually decided to start by targeting tattoo artists. In my head, at the time, I was certain that securing access with tattoo artists would be easy for me. (Sara)

While Sara was extremely excited about the possibility of studying tattoo artists, when it came time to actually start securing research participants, her initial excitement gave way to anxiety arising from various difficulties with the process. For example, she realized that her extreme shyness was an issue and the idea of approaching complete strangers and asking them to be part of her research terrified her. Thus, Sara continued to delay having to make contact with individuals by keeping on reading about gaining access and writing notes about the process rather than jumping into the next element—*contacting informants*. Regardless, Sara was still under the impression that after finding the courage to contact individuals, access would easily be granted, given her artistic background and personal network, which included individuals with access to tattoo artists.

Like Sara, Nadia implemented a funnel-approach when identifying informants, but she expressed feeling confused during this process. Her previous qualitative methodology training, as part of her doctoral studies, did not provide the "recipe" for how to select research participants. While she embraced the idea that there might not be "one way" to select a community of study, her feelings were compounded with the pressure to continue to gain momentum with the PhD. Her field-notes capture this frustration:

> There is a certain ambiguity involved in doing qualitative research—especially as you navigate your way around the haziness of the research process. It's almost like you need to put your fog lights on and be prepared for any unexpected turbulences—which there are bound to be plenty. (Nadia)

To summarize, the *identifying potential informants* element of gaining access entails connecting a research study with a pool of informants that may be potentially generative in answering research questions (Table 1). Each one of us began this element with the idea that deciding on and finding research informants would be relatively straightforward. We established a plan on who to include and who to omit and did not expect to encounter any issues when actually contacting informants, later in the process. However, as our personal accounts reveal, there were times when we felt stuck, either because we were scared to proceed or simply unsure of how to do so. In these instances, the rejection, confusion, and anxiety we experienced was not only borne out of our own inexperience in the field but also from the "mixed discourse" in the qualitative methodology literature between "how to do it" and "what it is" (Russell, Touchard, & Porter, 2002). Important resolutions to such challenges include remaining open to the ambiguity inherent to this element and finding the impetus to move on in the process of gaining access.

## *Contacting Informants*

During this element of gaining access, researchers contact informants, either directly or with the help of gatekeepers. As McCurdy, Spradley, and Shandy (2005) point out, there are three ways to finding an informant: (a) locating someone you already know; (b) approaching an informant "cold-turkey"—namely, contacting someone that you do not know; and (c) finding an informant through a go-between or gatekeeper. Gatekeepers can be employees or managers of the organization, personal contacts who belong to the group of interest for the study, or even the research participants themselves (in small businesses, for instance, gatekeepers often are the informants).

Our stories emphasize our concerns with securing dates and times to meet informants, particularly since scheduling meetings was onerous, given the pressure to get interviews secured and executed in order to meet deadlines and forge ahead with the study while still remaining respectful

and grateful for individuals' time and shared experiences. Nadia's initial strategy was to use a go-between to help secure participants because people within her personal network had offered to assist in providing access and making connections:

> There were many uncomfortable moments, mainly because I do not like pestering people. However, I did so anyway . . . . I was frustrated during this process but remained torn because on one hand I had a desire to "push ahead" with my study, but at the same time, had to maintain the relationship I had with those whom I was relying on to provide me with access to the people I wanted to interview. I waited anxiously for Sean[1] to get back to me with the 5-6 contacts he promised. However, after 2-3 weeks, I hadn't heard back from him. I wasn't sure what to do because I didn't want to constantly pester him, yet I knew I needed to get these interviews started . . . there I was, playing the waiting game. And it sucked. (Nadia)

Sara experienced similar challenges with making contact due to her reliance on her personal network to reach participants. While people within her network tried to assist with access, Sara did not hear back from any of the tattoo artists that they contacted. She then became emotionally flustered and questioned her own self-worth and the prospect of finishing the PhD. Sara's field-notes reveal how uncomfortable this element was for her: "I feel completely lost." She felt helpless, hopeless, and disoriented by the seemingly uncertain future:

> After several attempts to make contact with these artists, either directly or indirectly, I soon realized that gaining access wasn't going to be easy. Despite the several requests I sent for participation in my study, tattoo artists were simply unresponsive. As a result, my anxiety levels started going through the roof—I started having nightmares, followed by insomnia due to feelings of inadequacy and to the sudden realization that I might not be able to secure any access to research sites. (Sara)

Sara eventually realized that gaining access to tattoo artists was simply not an option for the time being. She decided to go back to her list of arts entrepreneurs in Missouri, collected during the *identifying potential informants* element, and find a different community of study. After receiving advisor approval on the new set of arts entrepreneurs, she started contacting individuals. However, because she is very shy, the thought of contacting informants cold-turkey simply terrified her:

> I sent an email to Sam[2] on Thursday inquiring about his interest in being part of a research study. He responded shortly after and suggested that I'd give him a call. I decided to call on Saturday so I'd have some time to put my thoughts in order before talking to him . . . . I was extremely nervous and even started crying before the phone call. [I was feeling the pressure and importance of this phone call; I even practiced the phone call several times. Contacting people that I don't know really stresses me out. Also, the fact that this really needs to happen for me, so that I can finish my PhD, also adds to all the pressure I've been feeling. I wasn't successful gaining access to tattoo artists, so I think I was afraid the same thing would happen with Sam; or at least I didn't want to mess it up.] Sam and I started talking and after further explaining some more details on what the study would entail (e.g., observations, one-on-one interviews), I asked if this is something that he would be interested in, and he said yes! HE SAID YES!!! (Sara)

For Sara, *contacting informants* entailed experiencing a rollercoaster of emotions arising from the difficulties associated with reaching out to individuals.

Like Sara, Amanda struggled with finding informants without the intervention of a gatekeeper, but she found it more difficult to decide how to present herself to potential informants. She considered using people that she knew (yoga teachers in her training program) but did not want to seem too eager or manipulative or conversely too flippant or uninterested. She did not want to overemphasize her role as a researcher but also did not want to underplay the importance of her doctoral research. She struggled with ethics: Was it ethical to use her current cohort of yoga teachers in training, a group that she was a part of? Her story speaks to being caught in-between, wanting to be liked by her yoga teacher class and to be done with her PhD:

> Here I was, already in, without the conscious decision to start, which felt like a manipulation of sorts. I got into the community under the guise of being a yoga teacher in training but at the first possible moment decided to try to use it to my advantage for rich data and a dissertation. And further, beyond the feeling of using my class I felt a bit like a freak: Like I was the kid who was excluded during recess, so I retaliated with … a study. (Amanda)

In sum, the *contacting informants* element of gaining access addresses the different ways through which researchers may reach informants (Table 1). Figuring out how to contact informants often depends on what is accessible and what makes sense given the research objectives and the researcher's comfort level. One option is to approach known individuals; this may help secure participation and might provide the researcher with feelings of possessing "insider" status because these individuals may wish to help the researcher out and may feel comfortable sharing their experiences due to previously established rapport. In certain situations, the researcher may not know people who meet the study's specifications, and in other instances, rapport might act as a double-edged sword whereby the researcher may not feel comfortable blurring professional and personal boundaries, as seen with Amanda. A second option, contacting informants cold turkey, may help alleviate some of the emotional turmoil associated with pressuring known informants. However, cold-calling participants also has disadvantages and trade-offs, such as poor response rates and limited participation due to researchers' outsider status as well as the increased time investment involved in researching and deciding who to contact. Moreover, some researchers may find themselves experiencing a rollercoaster of emotions because they have to contact complete strangers—a task that is not easy for shy individuals, such as Sara. While this was not our primary strategy, we all ended up contacting informants cold-turkey as a means to bolstering informant participation. A third option, finding informants through a go-between or gatekeeper, incorporates aspects of developing rapport and leveraging relationships and social networks; oftentimes, however, this results in delays in the process of making contact, as seen in Nadia's story, because researchers may have to wait for communication from both informants and gatekeepers. When using gatekeepers, it is important to also keep in mind that any problems arising from interactions with informants may ultimately undermine gatekeepers' organizational standing or reputation.

Other challenges researchers might experience during this element include a flurry of situations and emotions such as those associated with the need to demonstrate credibility as a researcher as well as deciding when and how to request informed consent. Resolutions for such challenges include engaging in "creative desperation" by adopting alternative (and sometimes unconventional) strategies to get in, finding ways to persuade informants and gatekeepers by emphasizing the potential benefits of the study (for both parties), and coming to terms with failure while learning from mistakes.

## *Interacting With Informants During Data Collection*

This element involves interacting with participants to collect data for the research project. For us, data collection entailed conducting interviews and engaging in participant observation. In our

stories, we all expressed facing challenges during this element. One such challenge was gaining informed consent from informants, a process that can be fraught with anxiety, as revealed by Sara's field-notes:

> Informed consent is always a dreadful thing for me to bring up. I actually feel physically sick (nausea, ugly stomach butterflies, shaky hands), I think because I'm so afraid that it will make potential informants not want to participate in the study, so I dread even bringing it up, particularly, because it feels like I'm giving them a chance (and several reasons) to say "no" after they've already said "yes." Most people I've interviewed think that this is a strange step in the process (probably because they've already consented, unofficially, and here I am asking them the same thing all over again). I will never forget Olivia's[3] reaction: She laughed really loud as I read my informed consent form out loud to her while she was driving us both to her studio. The first time she did that, I looked at her surprised, and honestly quite confused, as I wasn't sure what was going on, and she said, "No, no, keep going! Oh my gosh, this is great!" so I'd read another line in my informed consent and another strident laugh would follow, and on and on until I was done reading. At the time I felt silly, but in hindsight, it was kind of a funny situation ... at least, *she* had a blast! (Sara)

Although informed consent is often conceptualized as a simple task that needs to be accomplished in order for the research to take place, as a matter of course, it may not be that simple. As Sara's story illustrates, attempting to gain informed consent may entail an emotionally laden experience arising from the uncertain enrollment of individuals in the study.

Nadia's experience with meeting participants touches on a key issue that is often at play in the process of gaining access—gender dynamics. When attempting to enroll informants in her study, Nadia realized that many of the male participants would ask her out for a drink or coffee post-interview, an invite for which she was not prepared. Nadia's story reveals that she had to maintain the fine balance of keeping the door open for follow-up questions and post-interviews while shutting down the potential for personal encounters:

> I currently feel in a bit of an awkward position: Whenever I am online, he tries to chat to me on Gmail chat. I try to keep the conversation very professional and avoid any personal type questions. I am not sure whether I should delete him from this altogether? (Nadia)

Her field-notes further demonstrate this dilemma-ridden encounter in the field, coupled with her get on with it attitude:

> Like every interview, at the end I gave Victor[4] a general overview of the "next steps" of my study, and that I would share my results with all participants once my dissertation was completed. I think Victor thought that the "follow-up" was an opportunity to meet with me again: "We must go out while you are still in Dubai"; "I really like the smell of your perfume"; "You look a lot younger than I imagined" were just a few of the comments Victor made as we walked back to our respective cars in the parking lot. Usually I would reply back to those comments, but I had reached my goal of securing 30 participants .... I was one step closer at completing my PhD. (Nadia)

Nadia's story highlights her struggle to present herself as a researcher and to gain respect for her authority and expertise. Nadia being objectified and reduced to the smell of perfume illustrates how certain experiences destabilize "our implicit claims to expertise or authority" (Russell et al., 2002).

Amanda's field-notes reveal a similar experience where like Nadia she felt awkward and did not want to exert her authority as researcher onto fellow yoga teachers in her training program:

> Tonight I drove Meg[5] home after class. She actually doesn't live too far from me. As we chatted about the class, the upcoming weekend, I felt sad. She wanted to get to know me. And here I was, preoccupied with trying to figure out a way to ask her if she wanted to be in my study. It seemed I was going to have to pick—be her friend, or study her. How could I do both? (Amanda)

For both Nadia and Amanda, not being able to flex their expertise or authority left them feeling undermined, uncertain, and awkward. Thus, it is important to set boundaries for our role as researchers so that we can maintain professionalism while avoiding, as much as possible, any surprises and conflicting emotions.

To summarize, the *interacting with informants during data collection* element of our hopscotch process model involves meeting with informants to collect empirical material for the research study (Table 1). This element may be experienced many times throughout the process of gaining access. For example, after defining the boundaries of the study (*study formulation*) and deciding on a pool of informants (*identifying potential informants*), Nadia met with participants via pilot interviews (*interacting with informants during data collection*) and then returned to *identifying potential informants* to continue making decisions on potential participants. In contrast, Sara's inability to meet tattoo artists (and thus to move on to *interacting with informants during data collection*) reverted her back to *identifying potential informants* and then to redefine her study and get buy-in from her committee (*study formulation*) before she could work up to approaching new research participants (*contacting informants*). Amanda, on the other hand, had met participants (*contacting informants*) and decided on a community of study at the start of her study (*identifying potential informants*) but opted to not use them, eventually re-strategizing her study to approach a new group of yoga teachers (*study formulation*).

As our stories have demonstrated, we all experienced various challenges during this element, including struggling with uncertainty and anxiety while attempting to gain informed consent from informants (as with Sara's experience), feeling like one's authority as researcher is being undermined (as in Nadia's story), and struggling to find balance with the role of researcher while not imposing oneself on colleagues or friends (as with Amanda's experience). Resolutions to these challenges include ensuring reciprocity when getting informed consent (to secure informant's enrollment in the study and thus reduce researchers' anxiety) by highlighting the benefits of the study for both researcher and informants, preparing as much as possible for informants' actions (or inappropriate advances) in order to avoid being caught off guard, and setting boundaries for oneself as a researcher while striving for professionalism.

## *Re-Strategizing Access: Moving Ahead or Getting Out*

Given the nonlinear—and oftentimes recursive and frustrating—nature of gaining access, as well as the potential for being rejected many times over, researchers may need to rethink their approach in order to move ahead with their projects or simply decide to step out. Taking Feldman et al.'s (2003) "long hallway with a multitude of doors" metaphor one step further, we view this process as having the door slammed in our faces many times over. Our experiences point to how the potential for rejection permeates every element of our process model. However, amid this rejection lies the potential to pause, rethink, and re-strategize alternative ways to navigate around the issues impeding us from gaining access. Re-strategizing access due to rejection can thus take place during any element of the gaining access process, potentially being experienced in a repeated and nonsequential

**Table 2.** Re-Strategizing Access—Themes and Approaches.

| Re-Strategizing Approach | Basic Conceptualization | Basic Features/Tactics |
|---|---|---|
| Learning about the research process | Learning how to navigate around the implicit and explicit rules associated with gaining access | • Building a solid research case to garner support<br>• Learning from prior mistakes<br>• Acknowledging that theory is often different from reality |
| Self-learning | Learning about oneself as a researcher through the research process, being aware of how far one is willing to go as well as of one's own strengths, inhibitions, and/or inabilities | • Being open to ambiguity<br>• Being patient<br>• Learning about oneself as a researcher<br>• Being flexible and adaptable to others' requirements<br>• Knowing and reflecting on one's own limits<br>• Coming to terms with failure |
| Finding alternatives | Changing one's original strategy when it does not pan out; shifting from being passive to becoming an active player in the research process—a process borne out of "creative desperation" | • Selecting a different pool of research participants<br>• Thinking of alternative ways to contact informants<br>• Deciding on different means of communication to contact gatekeepers and informants<br>• Switching topics or abandoning the project |
| Ensuring reciprocity | Being mindful of stakeholders in the research process, emphasizing that the researcher or the study itself will offer something in return | • Being respectful of stakeholders' time and schedules<br>• Clarifying potential study benefits to gatekeepers and participants to persuade them to participate |
| Getting out | Recognizing that re-strategizing efforts are not working and deciding to pause research activities, returning to study formulation to brainstorm new ideas and research avenues | • Recognizing that one is "forcing" their way in while achieving limited to no success<br>• Losing time, money, and stamina<br>• Experiencing failure and feeling disappointment at not being able to make it work |

manner; as such, it threads our process model. Sometimes, however, the only strategy available to researchers may be to simply do nothing and wait. Other times, after attempting to do whatever possible to gain access, researchers may realize that an element cannot be re-strategized and that they may need to abandon the project, to give up and get out. In this section, we draw on our experiences within each element of the gaining access process to spotlight our different approaches in attempting to re-strategize. In doing so, we identify key themes related specifically to re-strategizing access. Table 2 provides an overview of these themes, which may occur simultaneously and repeatedly throughout the gaining access process.

*Moving ahead.* While discussing the *study formulation* element, we described some of the challenges associated with organizing our topic of study and with getting buy-in and support. We all

experienced various obstacles, whether it was Nadia rushing due to pressures associated with PhD completion, Sara feeling underprepared, or Amanda being nervous about her committee's response to changing her research topic. One salient theme in our attempts to re-strategizing was the need to engage in "learning about the research process" to play by the implicit and explicit rules of gaining access (Table 2). As discussed with the *study formulation* element, Amanda was nervous about telling her committee that she wanted to change research topics. After pondering different strategic tactics, she was able to broach this issue by building a research case to get support, thus garnering the confidence that the research topic was theoretically sound:

> I called my supervisor Monday morning on my way to the library with my thoughts from yoga class the night before. I shared my idea as though it was a minor research project. Then, when I heard "that sounds like a good idea," I shared that I was hoping to change directions with my PhD topic. Silence was his response. Followed by "OK" and instructions on what I needed to do to get the other committee members on board: Send an email, organize a meeting, and re-pitch the proposal to them. I was terrified. (Amanda)

During the *identifying potential informants* element, each of us initially assumed that gaining access would be a relatively easy step in the research process; however, our experiences later spoke to the need to re-strategize through "self-learning"—another theme in our stories (Table 2). Our particular tactics included staying open-minded and remaining flexible when things did not go as planned. As Nadia's field-notes reveal, "There needs to be a willingness to accept the unknown and the ambiguity involved in qualitative research. Accepting this, surrendering to the ambiguity, helps." Self-learning also entails self-awareness, reflection, and evolution, as revealed in Nadia's field-notes: "I know I may need to ask follow-up questions after the interview so trying to 'shut down' someone yet 'keep the door open' is a fine balance." Here, Nadia does not want to lose the opportunity to follow up with participants but is simultaneously trying to keep a firm grasp of her professional boundaries while learning about herself as a researcher.

While *contacting informants*, we all realized that approaching potential participants was not as straightforward as anticipated and that we needed to start "finding alternatives" to our original strategy to gain access (Table 2). Here, each of us went from being a passive participant, waiting for research participants to materialize, to becoming an active participant—a process fueled by a sense of creative desperation to get on with our dissertations. Nadia thought she would try out the alternative of soliciting informants, thus deciding "to take matters into [her] own hands and started a massive recruitment campaign via LinkedIn." Even though she felt that she was "pimping out" her dissertation by placing the recruitment call with her photo on LinkedIn, thus garnering unsolicited male attention, her participation rates suddenly turned around, and she began feeling optimistic due to her newly found success in finding and adding many professionals who fit her study's criteria.

*Getting out.* In situations when one cannot re-strategize an element of the gaining access process, they may be required to consider "getting out" (Table 2). For example, even after receiving committee approval (*study formulation*) and spending considerable time and effort *interacting with informants during data collection*, Amanda experienced additional challenges that prevented her from moving forward with the study, eventually forcing her to get out and start over. Specifically, her committee was reformed at the tail-end of her final year, with one member on a research-intensive sabbatical and two removed due to a political infraction within the school. Amanda's field-notes reveal this struggle:

> I'm terrified. I have this data now, I have it analyzed. And now I feel like I'm back at square one trying to plead my case for why I'm even trying to study yoga teachers. How am I back at

> this spot? I thought I had nearly climbed out of this pit I've been trapped in. Somehow I've slid right back down to the start, it feels. (Amanda)

This committee reformulation required Amanda to re-pitch her study's objectives and get buy-in from three new committee members (*study formulation*), all with different research backgrounds and interpretations of the data she had collected. Amanda's experience reveals that even once access has been negotiated and maintained (and the researcher has already exited the field), the study may still undergo reformulation due to institutional and political issues.

Sara also had to get out and start her study over, as soon as she realized her inability to gain access to tattoo artists. Until then, however, she continued re-strategizing her approach, and in an attempt to "finding alternatives" (Table 2), she sought the advice of colleagues knowledgeable in qualitative research methodologies. Talking to these individuals helped Sara regain her self-confidence and inspired her to devise a new plan to gain access to tattoo parlors—one that entailed changing her body with tattoos. Borne out of "creative desperation," Sara's determination was to come up with ways to turn the situation around and get access; to do so, she seriously contemplated changing her appearance as a potential means to blending in, passing as an "insider":

> My anxiety eventually gave place to sudden thoughts of how to strategically infiltrate this apparently inaccessible world of tattoo artists. I was ready to start wearing my old Metallica t-shirts, black skinny jeans, and worn out combat boots. But it eventually occurred to me that my pale, tattoo-free body might be one of the reasons why I started feeling like an outsider trying to "force" my way in; an outsider that up until now didn't even realize that she may not actually belong in this social world. When I came to such realization, I started considering tattooing my own body as the ultimate attempt to getting in . . . . But this strategizing only led to more anxious thoughts: "What am I doing to my own body just to be accepted in a world to which I may not even belong? Is it worth the potential consequences? How far am I willing to go for the sake of research?" (Sara)

Sara struggled with the potential consequences of getting a tattoo, specifically because her family would not be in support and because she did not want the permanent reminder on her body of her own struggles to gain access and complete her PhD. Sara was tired of fighting and forcing her way in; she was also embarrassed at the lengths that she was willing to go simply to gain access. As part of Sara's rejection and re-strategizing experience, she made the decision to give up on tattoo artists, getting out and starting over by selecting a new community of study:

> Giving up and moving on: I decided to stop "fighting/forcing" my way into tattoo parlors. I felt the need to gain access to an organization soon (my committee kept reminding me of that urgent need so that I could move on with my dissertation), so I decided to move on to a new target—luthiers. (Sara)

Her story further reveals:

> I refrained from "forcing" my way in shortly after I felt like a chameleon who would go as far as changing her appearance, even permanently, for the sake of research. Interestingly, however, I believe that my pale, still tattoo-free body proved helpful in gaining access to another arts entrepreneur—a very traditional European luthier—whom I have been studying for the past six months. (Sara)

Shortly after abandoning tattoo artists, Sara was able to gain access to a number of arts entrepreneurs in the musical and visual arts—a luthier, a painter/sculptor, and a mixed-media artist. She is

currently in the final stages of writing her reformulated dissertation; however, she still hopes to study tattoo artists in the future. As Sara's experience demonstrates, sometimes researchers must engage in self-learning while coming to terms with failure, thinking about what went wrong, learning from mistakes, and reflecting on how far they are willing to go. Simultaneously, they may need to recognize the need to try a new angle to gain access, perhaps resorting to abandoning research targets and trying an entirely new community of study.

When discussing the difficulties associated with *contacting informants*, Sara acknowledges that she failed to think about "ensuring reciprocity" and, consequently, to persuade informants to participate (Table 2). To Sara, this drastically affected her chances of actually gaining access; however, it also provided her with a learning opportunity. Sara's realization that she was unable to access participants evoked a great sense of anxiety that ultimately led to her conceding defeat. During this process, however, she learned, possibly the hard way, about both the research process and the importance of "ensuring reciprocity":

> Because I felt super confident about gaining access, perhaps I overlooked some key notions that I should have conveyed to potential research participants. Specifically, I never actually thought about making it explicit to potential informants the specific reasons why they should participate in my study—namely, what was in it for *them*. All I told people I talked to was "I believe that the results of this study will help scholars (and consequently students) understand more about the processes underlying arts entrepreneurs' creative activities, as well as their positive impact in the surrounding community and the economic environment." But I don't think that this was compelling enough for tattoo artists to grant me access to their cultural world. If I could go back, I'd change this. (Sara)

Sara's story illustrates that as the gaining access process unfolds, there is an opportunity for learning——an aspect critical to the success of any re-strategizing efforts. In fact, we emphasize that both "self-learning" and "learning about the research process" take place every time we get knocked down.

To summarize, we all experienced confusion and uncertainty in trying to gain access and had to adapt and cope with various pitfalls. Gaining access involves "some combination of strategic planning, hard work, and dumb luck" (Van Maanen & Kolb, 1985, p. 9). The challenges that we experienced propelled us to work hard, engage in strategic resourcefulness, and figure out alternative ways of gaining access—a process we term *creative desperation*. That said, re-strategizing did not always lead to access, as seen with Sara's story, where she eventually had to throw in the proverbial towel when she could not gain access to tattoo artists, deciding to give up on the original strategy and thus going back to the beginning, to the *study formulation* element of the gaining access process.

## Discussion

In this article, we propose a dynamic, interconnected, and nonlinear process model of gaining access—one that requires persistence, flexibility, and resourcefulness throughout every element. In doing so, we expand on Feldman et al.'s (2003) metaphor of gaining access as a "long hallway with a multitude of doors" (p. ix) and propose a dynamic, nonlinear process model of gaining access that underplays the importance of agility, balance, and flexibility. Brown-Saracino (2014) argues that "problems of access are not merely a practical problem, but a data source worthy of documentation and analysis" (p. 64) and has called for researchers to further explore the process of "getting in" and "gaining access" (p. 47). We have answered this call by elaborating a hopscotch process model of gaining access and, using autobiographical story excerpts, illustrate the dynamism, confusion, and complexity inherent to this process.

The result is a process model comprising four elements: *study formulation with plans to move forward*, *identifying potential informants, contacting informants*, and *interacting with informants during data collection* (Figure 1). One of our contributions is to abstract from the complexity of our stories to provide, in Table 1, a summary of each element, its conceptualization, key features, challenges, and resolutions. We believe researchers will find this helpful as they attempt to gain access into communities of study. In our case, while each of us experienced every element in the model, our particular experiences and reactions differed. As a result, the temporality and sequencing of elements varied for each author. We use the children's game of hopscotch as a visual metaphor to depict the dynamic, complex, and nonlinear turns with each element.

Hopscotch can be played with several players or alone, much like research projects. The player (researcher) tosses a small object into numbered spaces of a pattern of rectangles outlined on the ground and then hops through the spaces to retrieve the object. Players do not need to hit every space in sequential order, and they have the ability to bypass certain spaces, depending on their play and opportunity. Hopscotch also allows players to move both forward and backward or to step on two spaces at once, demonstrating that the process of gaining access is not tidy or linear; rather, it is dynamic and, potentially, quite complex.

The process of gaining access is immensely unique to each researcher and the context(s) of his or her study. Thus, the steps a researcher may have taken in one study may not be replicated in another (nor may it be desirable). Instead, it is critical to remain open and flexible and to continually prepare for—and adjust to—the "messiness" underlying the process (Sparrman, 2014, p. 305). We show that embracing ambiguity, being resilient and open to learning, and adopting a "going with the flow" mentality are crucial for gaining access, thus emphasizing the need to unshackle ourselves from the rigidity of static "steps" or "phases" and to be open to playing with agility and flexibility, as required with the game of hopscotch.

The theme of rejection and re-strategizing is an important one for each element of the gaining access process and offers a contribution to the literature, which currently does not adequately address the hurdles and rejection that researchers experience as they attempt to gain access. Table 2 summarizes the intricacies of re-strategizing rejection by describing broad themes emerging from our approach. Again, we believe future scholars may find these useful as they experience the challenges of gaining access and need to devise strategies to move ahead with their research. When considering the notion of re-strategizing, we need to acknowledge the importance of timing (Okumus et al., 2007), as sometimes the only strategy available to the researcher may be to simply do nothing and wait (as in the case of Amanda or Sara). Other times, however, researchers may realize that waiting or re-strategizing are simply not plausible options, particularly when deadlines need to be met, thus having to abandon the project by getting out and, potentially, starting over.

As our stories demonstrate, we often experience a rollercoaster of emotions, which is typical of any research project entailing "an iterative process, a going back-and-forth and a complicated flux of actions" (Sergi & Hallin, 2011, p. 196). It seems that these uncomfortable and ambiguous encounters are provoked by a sense of pressure with respect to the "correct" and "efficient" way of doing research; oftentimes, these two contradict each other. Further, our stories express our preoccupation with the notion of being "locked out" (Kusow, 2003, p. 596), thus elevating the importance of "insider" status within the research process—something we believe may help in guaranteeing both access to chosen participants and subsequent research "success." As Kusow (2003) argues, "The researcher's relationship with research participants may not be determined a priori" (p. 592). However, it appears that we have bought into the rhetoric surrounding the importance of being an insider and combined with our desire to comply with the pressures of "good" qualitative work; we experience agitation when we realize that we may never achieve such status. This is seen in Amanda's struggle to "play the part" of yoga teacher or in Sara's unsuccessful attempt to fit in with a certain subculture of tattoo artists.

The theme of ''doing whatever it takes'' was salient, but as our stories demonstrate, limits and boundaries are often set. The challenges we face and the pressure we feel, combined with our ambition and hard work, generate creative desperation—a strategic resourcefulness that enables us to re-strategize, within certain boundaries, when faced with rejection. But as we re-strategize, we are oftentimes willing to ignore or marginalize how this strategic resourcefulness makes us feel, particularly in situations when we consider altering our bodies with tattoos, tolerate unwanted sexual attention, or exploit peers for the sake of research. Thus, uncomfortable encounters may actually be partially created and maintained by us, as opposed to being simply imposed onto us. However, sometimes our efforts at re-strategizing were not enough, and we had to get out and start over. Our stories reveal that we may be both victims to and complicit in the rejection we experience.

We emphasize that while existing research highlights the significance of researchers' identity and/or role in identifying the origins of access problems (Blee, 2002; Sheff & Hammers, 2011; Venkatesh, 2008), it is important to go beyond a primary focus on the researcher to explore other dimensions in the process of gaining access, such as the role of gatekeepers and potential informants themselves. Doing so enabled us to reach a contextualized understanding of ''research stumbles'' in the gaining access process (Brown-Saracino, 2014, p. 48) as well as to contribute to an under-theorized area of research (Crowhurst, 2013). In this article, we share our experiences within the various elements of gaining access while exploring the various stumbles and rejections we encountered that took us back to the drawing board many times over, by virtue of either our identity or the process itself. In doing so, our process model goes beyond what may be interpreted as the ''weaknesses'' of the researcher to consider the role and impact of broader factors. We acknowledge that our stories are candid, unedited glimpses into our research process and that ''once a story is told, it cannot be called back. Once told, it is loose in the world'' (King, 2003, p. 10). There is a nakedness associated with revealing these uncomfortable experiences of gaining access, in admitting that we do not always know what to do next, or in accepting defeat and moving ahead when the most thought-out plan does not pan out.

Our main contribution is that we spotlight the constant potential for rejection throughout the gaining access process while elucidating that re-strategizing is a vital and recurrent feature of any research approach involving human subjects. This applies to gaining access not only for grounded, qualitative research projects such as ethnography and phenomenology but also quantitative approaches such as surveys and experiments. For instance, before a survey can actually be administered, researchers need to deal with academic institutional issues while planning and organizing their study, including getting approval from ethics boards (*study formulation*); they also need to decide on an appropriate sample and sampling frame (*identifying potential informants*) and to find ways of contacting individuals in the sample—be it by finding someone they already know, engaging in a cold-turkey strategy, or approaching a go-between (*contacting informants*). Although the level of *interaction with informants during data collection* is not as high for survey research as it is for experiments, any quantitative researcher conducting studies involving human subjects will most likely experience the elements in our proposed process model. And for them, this will also be a process fraught with challenges that will require continual re-strategizing. Thus, it is our hope that both qualitative and quantitative researchers can learn from our experiences and that they find both our hopscotch process model and the summaries in Tables 1 and 2 useful, not only in becoming aware of what to expect when attempting to gain access but also in developing their own tactics to deal with hardships.

## Limitations and Future Research

While the proposed process model does shed some light on the dynamic and nonlinear process of gaining access, this study is not without limitations. First, while we briefly address gender issues in

our article, we purposefully do not explore this theme in great depth. Gender issues are often at play in the process of gaining entry, either implicitly or explicitly, as illustrated in our stories, specifically in Nadia's. Because this is an important and complex topic, we believe that it deserves a more thorough investigation that goes beyond the scope of this article. Thus, future researchers might consider exploring gender issues, specifically those connected with gender dynamics in the process of gaining access, by conducting a thorough review of the literature exploring field research (e.g., ethnographic literature), developing a survey focusing on the different experiences of female and male field researchers as they attempt to gain access, or conducting a qualitative study of the lived experiences of researchers during this step of the research process.

Second, we do not address the implications of national context to our experiences with gaining access. All three stories unfold in national contexts that arguably differ from one another, and although our experiences might indeed reflect factors within national context, we feel that further exploration of this issue is needed. For instance, Northern Europe is known for having a long tradition of collaboration between industries and business schools, making access to organizations relatively unproblematic.[6] However, researchers in other locations, as is our case, might have a different experience. Thus, we encourage field researchers to reflect on their experiences in light of national context and on how it might influence the process of gaining access.

Third, we develop a process model of gaining access, which, just like any model, is an abstraction intended to provide a generalized understanding of an important phenomenon—one that, some argue (and we agree), does not necessarily progress in a linear fashion (see Cunliffe & Karunanayake, 2013). We have attempted to present our process model in a dynamic, nonlinear way, depicted via a game of hopscotch; but it is important to note that this process model does not capture all of the intricacies, circumstances, and pitfalls of gaining access. As such, it should not be taken as "final for once and for all"; rather, it should be used reflexively as researchers pause and make sense of their own experiences with gaining access (Gephart, 1978, p. 580). In addition, this process model was developed from our personal experiences and examined through autobiographical stories. The intention here was not to "prove" each element of the process model but rather to share our experiences with each element of the process. We believe many of these insights and challenges are also associated with other methodological approaches and techniques. Thus, we encourage scholars to continue to reflect on, empirically explore, and further develop this process model through the use of quantitative methods as well as other qualitative approaches.

## Concluding Thoughts

Through the use of autobiographical stories, the aim of this article was to generate a way to capture the potential challenges, remedies, and emotional reactions associated with the various elements of gaining access during our doctoral research. The results of our analysis suggest that as researchers, we may often fall prey to the messiness associated with securing research participants but that we may also be complicit in the messiness we seek to interrogate. It is in this in-between space that we appear to experience an epistemological conundrum—the stark realization that we may need to do whatever it takes to move our research project along yet unable or unsure of how to proceed. Thus, the uncomfortable encounters associated with getting in need not be imposed onto us but may in fact be created by us as a result of our need to get on with our research.

While the process of gaining access may render us vulnerable, we feel it is imperative to turn the analytical and interrogative gaze onto ourselves to gain an in-depth understanding of these experiences and its associated epistemological implications. We hope that in doing so we offer more dimension and perspicacity to the gaining access process. Gaining access, like trying to win at a children's game of hopscotch, entails moments of frustration and disappointment, but this, of course, is nestled in between other moments of joy, excitement, and enthusiasm.

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## Notes

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