



**Grounded theory: historical evolution, nursing, and constructivist grounded theory**

**Teoría fundamentada: evolución histórica, enfermería y su variante constructivista**

**Teoria fundamentada: história, enfermagem e teoria fundamentada construtivista**

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## ABSTRACT

**Objective:** This article aims to critically examine the origins of grounded theory and its relationship to nursing by analyzing its historical development and contributions to knowledge in the field. **Development:** The study defines and explores the historical and epistemological origins of grounded Theory as a methodology within the social sciences. Furthermore, it analyzes the historical link between grounded theory and nursing—an area that has received limited attention in the literature. Subsequently, it delves into a critical analysis of the epistemological evolution of grounded theory, particularly its constructivist variant, highlighting distinctive features and critiques. The article concludes with reflections on the noticeable gap in this area in the Spanish-speaking academic context. **Conclusions:** The complexities of contemporary nursing practice demand methodologies that not only describe and interpret the contributions of nurses to individual and public health but, more importantly, explain the intricate processes through which care is delivered.

**Keywords:** Grounded Theory; Knowledge; Qualitative Research; Nursing Research; Nursing Theory.

## RESUMEN

**Objetivo:** Revisar críticamente los orígenes de la teoría fundamentada y su relación con enfermería, analizando su evolución histórica y contribución al conocimiento en enfermería. **Desarrollo:** Se define y analiza los orígenes históricos y epistemológicos de la teoría fundamentada como metodología en las ciencias sociales. Igualmente, se analiza el enlace histórico de la teoría



fundamentada con enfermería, un aspecto que ha sido poco abordado en la literatura. Luego continúa con un análisis crítico de su evolución epistemológica en su variante constructivista, características distintivas y crítica. El artículo finaliza incluyendo algunas reflexiones dado la brecha en el mundo hispano parlante. **Conclusiones:** Las complejidades del quehacer enfermero necesita hoy más que nunca metodologías que permitan no solo la descripción y comprensión del aporte de las enfermeras a la salud de las personas, pero por sobre todo explicar la complejidad de cómo estos procesos de cuidado ocurren.

**Palabras claves:** Teoría Fundamentada; Conocimiento; Investigación Cualitativa; Investigación en Enfermería; Teoría de Enfermería.

## RESUMO

**Objetivo:** Revisar críticamente a história da teoria fundamentada, sua relação com a enfermagem, e sua contribuição para o conhecimento de enfermagem. **Desenvolvimento:** Define e analisa a história e os fundamentos epistemológicos da teoria fundamentada como uma metodologia de pesquisa proeminente nas ciências sociais. Além disso, o artigo analisa o vínculo histórico entre a teoria fundamentada e a enfermagem, que tem sido discutido de forma limitada na literatura. Também revisa criticamente a evolução epistemológica da teoria fundamentada e, em particular, as características distintivas e críticas da teoria fundamentada construtivista. Finalmente, algumas reflexões sobre a limitada literatura em espanhol são destacadas. **Conclusões:** As complexidades do cuidado de enfermagem exigem metodologias de pesquisa que desenvolvam conhecimento além da descrição e destaquem o cuidado de enfermagem e a contribuição para a saúde e as experiências das pessoas, mas também como esses fenômenos sociais complexos de enfermagem ocorrem.

**Palavras-Chave:** Teoria Fundamentada; Conhecimento; Pesquisa Qualitativa; Pesquisa em Enfermagem; Teoria de Enfermagem.

## INTRODUCTION

The complexities of nursing practice today require methodologies that go beyond merely describing and understanding nurses' contributions to healthcare. There is a pressing need for approaches that also explain the intricate ways in which care processes unfold in practice. Although various methodologies have been employed to address these challenges, Grounded Theory (GT) is one of the most widely used in nursing research.<sup>1</sup>

Grounded Theory was developed in the 1960s as a critique of existing methodologies in the social sciences, which were primarily focused on verifying pre-existing theories rather than generating Theory *from the data*.<sup>2</sup> The method takes its name from this premise and has since become one of the most established methodologies in qualitative research.<sup>3</sup> At its core, GT is "a methodology for developing theory that is grounded in data systematically gathered and analyzed."<sup>4</sup> Despite its broad applicability across the social sciences and health disciplines, nursing was one of the earliest fields to adopt GT. A pivotal figure in this adoption was American nurse Jeanne Quint Benoliel, who played a key role in the seminal study on death conducted by Barney Glaser and Anselm Strauss—the study that laid the foundation for GT and culminated in its publication in 1967.<sup>5</sup>

This article aims to reflect on and critically analyze the origins of GT and its relationship with the field of nursing. To do so, it reviews the historical and epistemological development of the methodology and considers its contributions to knowledge in the field of nursing.

## DEVELOPMENT

### Grounded theory and its origins

Grounded Theory (GT) is “distinctive among research methods due to its primary aim: to develop theories from data and empirical analysis in order to explain a phenomenon.”<sup>6</sup> While this goal may now appear as a standard feature of other qualitative methodologies, understanding GT's historical context provides key insights into its core concepts and explains why many of them are still considered the gold standard in contemporary research. Grounded Theory emerged as a critique of the dominant research paradigms of the 1960s, which were shaped mainly by positivism and a deductive logic of theory construction and knowledge generation.<sup>6</sup> Its origin and popularity can be traced to “The Discovery of Grounded Theory,” which, in my opinion, is the entry point for any scholar seeking to become a grounded theorist.<sup>2</sup>

One of the revolutionary aspects of GT within the social sciences was its emphasis on theory generation to explain phenomena as social processes.<sup>1-2,7</sup> Barney Glaser's contributions stem from his background in quantitative methodologies and his focus on the systematization of methods and processes, as well as the notion of *discovery*—a concept now viewed as a hallmark of classic or Glaserian GT.<sup>7</sup> In contrast, Anselm Strauss drew from symbolic interactionism and pragmatism, highlighting the importance of interactions, meaning, and action, concepts that are now central to the Straussian approach to GT.<sup>1,7</sup> Several texts, now considered classics, help illuminate not only the methodology itself but also how grounded Theory is constructed from data and written. These include the foundational studies on death and dying: “Awareness of Dying,”<sup>8</sup> “Time for Dying,”<sup>9</sup> and “Status Passage.”<sup>10</sup> Unfortunately, none of these books are currently available in Spanish.

### Nursing and the early development of grounded theory

One of the unacknowledged founders of GT is American nurse Jeanne Quint Benoliel, who played a crucial role in data collection and access during the original study on death conducted by Glaser and Strauss. Only recently several scholars begun to highlight her contributions, emphasizing their significance in understanding GT's origins and its influence on fields such as nursing.<sup>5</sup> Stern, in writing Benoliel's obituary, remarked: “When Glaser and Strauss treated her [Jean Quint Benoliel's] data as their own, she beat them to it by publishing first—Quint's paper titled ‘The Nurse and the Dying Patient.’”<sup>11</sup> The Nurse and the Dying,<sup>12</sup> book published in 1967, significantly influenced the development of palliative and end-of-life care in the United States. Benoliel led numerous initiatives and research projects in this area, fundamentally transforming care practices and communication with terminal patients, as well as redefining the roles of nurses and physicians.<sup>13</sup> As a professor at the University of Washington, Benoliel mentored generations of nurses in the use of GT in the United States. Her work earned international recognition, including multiple awards and honors, even posthumously following her death in 2012.<sup>11</sup>

### Grounded theory and its epistemological evolution

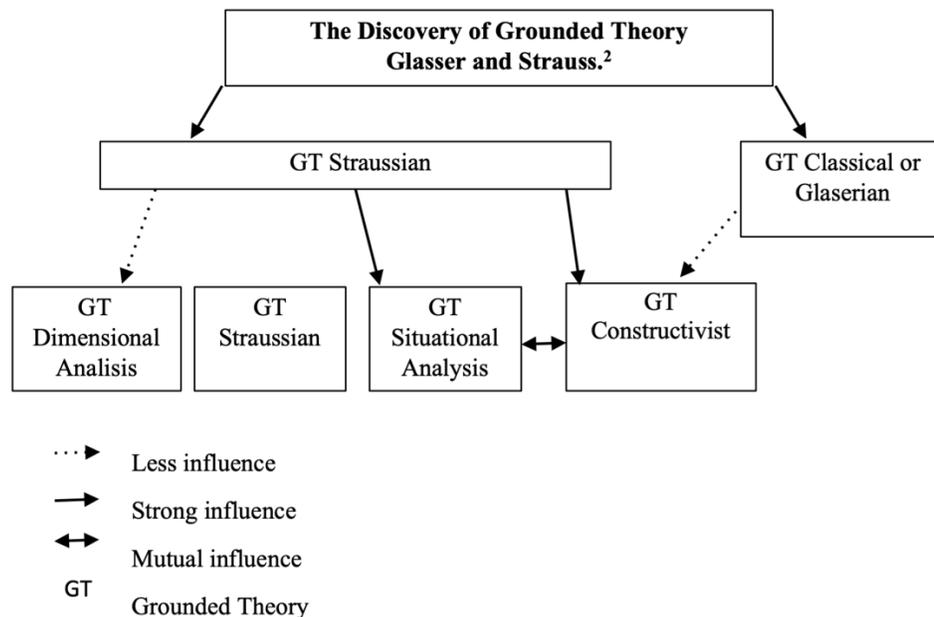
To fully understand the evolution of GT as a methodology, we must critically examine its epistemological foundations, beginning with its original authors, Glaser and Strauss. Bryant and Charmaz argue that, due to Glaser's strong positivist orientation, GT was initially conceived from a positivist understanding of knowledge and subsequently applied to qualitative research.<sup>7</sup> The very name of the methodology, along with its emphasis on ‘discovering’ reality, reflects a belief in an objective world that can be uncovered and analyzed. In contrast, Strauss's influence is evident in the methodology's focus on social interaction and an openness to exploring the social world. It is perhaps unsurprising, then, that their early writings, such as “Time for Dying,” reveal the authors' influence on the research process itself, even though they did not explicitly acknowledge their influences. This

has led scholars to critique the epistemological inconsistencies present from the inception of GT.<sup>6-7</sup> Given these fundamental philosophical differences in how reality is understood and explored, the subsequent epistemological divergence of GT is understandable. Glaser continued to develop the classical or Glaserian version of GT. At the same time, Strauss, with his emphasis on interaction, meaning, and action, collaborated with another nurse, Juliet Corbin, to develop what are now considered the core features of the Straussian approach—the only version of GT currently available in Spanish.<sup>14</sup>

### The epistemological expansion of grounded theory

In the decades following its initial development, GT underwent a process of epistemological and theoretical diversification. This evolution gave rise to what has been referred to as the "second generation" of GT, led by researchers who were either students or collaborators of the founders at the University of California, San Francisco (UCSF), in the United States<sup>1</sup> (See Figure N°1.)

Figure N°1: The genealogy of Grounded Theory.



Source: Adapted and translated from Clarke (p.18).<sup>15</sup>

One key development was Dimensional Analysis (DA), also known as Dimensional Grounded Theory (DGT), pioneered by Leonard Schatzman, a student and collaborator of Strauss. This variant emerged as a way to make the analytical process of GT more explicit and transparent. Primarily applied and expanded by Bowers, DA distinguishes itself by focusing on the recognition of dimensions within the data and how the analyst's perspectives or assumptions shape these. In other words, the emphasis is on making visible the relationship between data analysis and acts of interpretation. A central tenet of this approach involves clearly defining dimensions, especially how one "defines the situation," thereby rendering the analytical process more transparent. Interestingly, this methodological development emerged from Schatzman's experience teaching GT to master-level nursing students at UCSF.<sup>1</sup>

Situational Analysis (SA) or Situational Grounded Theory also evolved as an extension of the Straussian tradition, integrating symbolic interactionism and social theory, while also incorporating elements of Constructivist GT, particularly in its use of inductive and abductive data analysis.

Moreover, SA introduces elements of poststructuralism and posthumanism, acknowledging the influence of both human and non-human actors—such as technologies, animals, plants, and both natural and built environments—on the phenomena under study. Using situational maps, SA generates knowledge about the relationalities among empirical elements by examining how these elements matter, their relative power, and how various stakeholders are implicated.<sup>15</sup> Situational Grounded Theory represents a return to constructionist epistemologies, offering a novel and compelling methodological alternative. Finally, we turn to Constructivist Grounded Theory (CGT), which will be discussed in greater detail in the next section.

### **Constructivist grounded theory**

Developed by American sociologist Dr. Kathy Charmaz, Constructivist Grounded Theory (CGT) represents an epistemological evolution of the original methodology while maintaining its core strategies and practices.<sup>16-17</sup> Charmaz's CGT is characterized by (1) adopting a relativist epistemology, (2) recognizing multiple perspectives, roles, and realities, (3) a fundamentally reflexive stance, and (4) situating research within its historical, social, and cultural contexts.<sup>17</sup> The emphasis on the researcher's role and their close relationship with the phenomenon under study—as a co-construction of reality—offers ontological and epistemological clarity and consistency, making CGT a philosophically and methodologically rigorous and transparent approach.<sup>7</sup>

As a methodology, CGT preserves and places special attention on the five distinctive features of GT: (1) simultaneous data collection and analysis, (2) constant comparative analysis, (3) theoretical sampling, (4) theory generation as the primary aim,<sup>3</sup> and (5) the applicability of the resulting theory.<sup>7</sup> This last characteristic—the emphasis on applicability—makes CGT particularly relevant and popular in nursing and health sciences, as it contributes to bridging the gap between theory and practice and informs health policy.<sup>15,18</sup>

While some aspects of GT may be adopted as specific methods, several authors stress the importance of clarity when employing GT as a complete methodology. That is, it requires a comprehensive integration of all its components,<sup>6,19</sup> particularly its defining features, within a flexible, iterative, and reflexive research process.<sup>17</sup> This perspective generates knowledge embedded in social constructions shaped by the researcher's viewpoint, social position, and interpretation.

Charmaz noted that constructivist researchers are able “to enter the liminal world of participants' meaning and action in ways that classical grounded theorists cannot.”<sup>17</sup> Researchers adopting the constructivist perspective thus understand social reality as a multiple, constructed process. Accordingly, the research process itself is approached as a co-construction of often implicit and unspoken realities.<sup>20</sup> This is evident in numerous studies employing this perspective, which have made visible and explicit various dimensions of nursing care.<sup>20</sup>

The theorizing process in CGT is inherently dialogical and interpretive, occurring between participants and the researcher in the co-construction of a middle-range theory designed to guide practice. This requires the researcher to be active, creative, and reflexive while engaging in constant comparison of data, ideas, and existing theories in order to generate new theoretical insights.<sup>2,17</sup> These practices, closely tied to abductive reasoning, have contributed to CGT becoming one of the most widely used GT approaches.<sup>6</sup> To facilitate theory development, the methodology proposes a series of systematic strategies and practices that support conceptualization grounded in data: (1) sensitizing concepts, (2) sampling strategies, (3) data analysis, (4) constant comparative method, (5) coding, (6) memo writing, (7) theoretical sensitivity, (8) theorizing, (9) theoretical saturation, and (10) the core concept—Theory.<sup>2,17,21</sup>

A common critique of this approach, however, concerns the transparency of the reflexive process: how to ensure that it does not arbitrarily or excessively subjectively influence theory development.<sup>22</sup> Reflexivity and thorough documentation of the creative and theoretical process are essential for demonstrating methodological rigor, and techniques such as memo writing and maintaining a systematic research journal are critical tools. The aim is to make visible the connections between macro- and micro-levels of analysis, linking subjectivity to the social world.<sup>16</sup> This allows for a more comprehensive understanding of the relationships that explain a given phenomenon.

### **Challenges in the use of grounded theory**

Despite the growing popularity of Grounded Theory (GT) and Constructivist Grounded Theory (CGT), one of the most significant challenges for nursing research in Spanish-speaking contexts is the language barrier. The foundational texts (“The Discovery of Grounded Theory” by Glaser and Strauss<sup>2</sup> and “Constructing Grounded Theory” by Charmaz<sup>17</sup>) have not been translated into Spanish. This lack of access creates barriers to both understanding and applying the methodology in Spanish-speaking settings. The only major work currently available in Spanish is the textbook by Strauss and Corbin,<sup>23</sup> which is more commonly used, primarily due to its widespread availability. Despite these challenges, nursing studies utilizing GT have been published in the region, particularly in Brazil,<sup>24</sup> while interest in the methodology is increasing in Chile and other Latin American countries. However, although publications are employing GT in nursing, the explicit articulation of abductive reasoning and mid-range theory development remains challenging to identify.<sup>25</sup> This article addresses that gap by facilitating a clearer understanding of GT and emphasizing its potential as a research methodology in nursing across the region. It also issues a call for researchers to continue publishing detailed accounts of their methodological processes when using GT. This transparency is essential for documenting and evidencing the application of GT’s distinctive features in the development of middle-range nursing theories.

### **CONCLUSIONS**

A critical review of the origins of Grounded Theory as a methodology in the social sciences underscores its historical significance and relevance to nursing. Tracing the historical and epistemological evolution of GT enables a deeper analysis and appreciation of the methodological rigor that has made it one of the most influential approaches in the health and social sciences. Constructivist Grounded Theory, in particular, provides a rigorous framework for developing middle-range theories and holds significant value in nursing, informing clinical practice. However, language barriers continue to limit the full potential of GT in Spanish-speaking contexts. Given the increasing complexity of contemporary nursing practice, there is an urgent need for methodologies that not only describe and understand nurses’ contributions to health but also explain the intricacies of how care processes unfold. Grounded Theory provides the methodological rigor necessary to meet this demand.

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