

12th ECPR Summer School in Methods and Techniques, 27th July to 12th August, 2017
Central European University, Budapest, Hungary
Course Description Form¹ - 1 week course (15 hrs) (31st July - 4th August)

Course title

Qualitative Data Analysis: Concepts and Approaches

Instructor details

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Short Bio (ca. 50-70 words):

Marie-Hélène Paré is an eLearning consultant who lectures program evaluation in the Master in Health Social Work at the Open University of Catalonia, and a freelance lecturer and consultant in qualitative data analysis. She was educated in Quebec, Beirut and Oxford. She is a registered social worker who worked and conducted research in violence against women and community participation in humanitarian interventions. She taught social work at St-Joseph University in Beirut, Lebanon, and has lectured qualitative data analysis in more than forty universities and research centres worldwide. Her methodological interests lie in qualitative data analysis, qualitative evidence synthesis, emancipatory social sciences, indigenous epistemologies, and participatory methodologies.

Prerequisite knowledge

No prerequisite knowledge of qualitative analysis or NVivo, but basic knowledge of qualitative research necessary.

Short course outline

Are you planning to conduct interviews or focus groups for your data collection, or perhaps do participant observation during events or meetings? Or will you be collecting policy papers, press articles, or Internet data from blogs, Facebook or Twitter? If you do any of the above, you will soon or later have to face the pile of data you collected and analyse them. Will you know how?

This course provides strategic understanding and applied skills in planning, conducting, and reporting the process of qualitative data analysis (QDA) in a research project. At the end of the course, participants will be able to plan, conduct, and critically assess the quality of QDA in their own and other people's research. Key concepts covered include: problems and prejudices associated with QDA; relationship between epistemology, methodology, and methods of qualitative analysis; approaches to code qualitative data; strategies to seek patterns and identify relationships; and best practices in reporting findings of qualitative research. The course alternates between lectures, group discussions, and hands-on sessions with NVivo. Participants conducting qualitative analysis as part of their PhD, postdoc or for government or research centre commissioned research will particularly benefit from the course.

¹ *Disclaimer: the information contained in this course description form may be subject to subsequent adaptations (e.g. taking into account new developments in the field, specific participant demands, group size etc.). Registered participants will be informed in due time in case of adaptations.*

Long course outline

Definition of qualitative analysis

Qualitative analysis is the search for patterns in textual, visual, or artefact data and the explanation for why these patterns exist in the first place. While statistics rely on the use of probability theory to estimate population inferences, qualitative analysis uses social theory to decontextualise the raw data in segments and recontextualise them in codes, so second level constructs may be generated, relationships uncovered, and hypotheses formulated. Qualitative analysis may be conducted inductively by identifying conceptual categories directly in the data, or deductively by applying predefined theoretical notions onto the material. A mixed approach to analysis - when both induction and deduction are used in different points in time in the analytical process - is increasingly popular since it makes use of the researcher's theoretical sensitivity and allows space for meaning making and concept formation.

Criticisms about qualitative analysis

Historically, qualitative analysis has been criticised for being opaque and subjective given that it is sometimes difficult to see how researchers went from hundreds of interview pages to a handful of conclusions, since no discussion is provided about what the researchers *actually* did when they analysed their data. For this reason, the phase of qualitative analysis has been associated with a 'black box' problem: we are told what data were collected and what results these yielded, but nothing in between. There is also a misconception that qualitative analysis merely involves the identification of themes in the data. The analytical tasks researchers should be concerned about - that is, the examination of commonalities and differences across units of analysis, discovering patterns and relationships across the data, and synthesizing these in a storyline, model, or schema - is most frequently than not absent in published qualitative studies. Conversely, the widespread myths that the 'method will emerge' from the data, or that researchers' tacit knowledge will lead them to 'make sense' of the data account for opaque reporting since no audit trail accompanied the analytic process.

Contribution of this course

This course introduces the key concepts to plan, conduct, and report qualitative analysis in a transparent, traceable, and auditable way. Participants will learn the best approach to code and analyse their data based on their research questions, study purpose, type of data collected, and the expected outcome of their study. The stages of qualitative analysis will be demonstrated with NVivo so participants can learn how theory is put into practice as well as the advantages and potential pitfalls of using qualitative software for data analysis. Participants are invited to use the NVivo free trial for the course or other qualitative software they are familiar with for the workshop sessions and daily assignments. Software demonstrations by the instructor and teaching assistant will only be done using NVivo, however.

Objectives

The learning objectives are:

1. To review the historical problems associated with QDA
2. To illustrate the relationship between epistemology, methodology, and method of QDA
3. To try out different approaches to code qualitative data
4. To apply different strategies to seek patterns and uncover relationships
5. To craft graphic displays that effectively present qualitative findings

Expected outcomes

At the end of this course, participants will be able to:

1. Recognise the 'black box' problem of QDA in their field
2. Design a QDA plan congruent with their research design
3. Choose the right approach to code a qualitative dataset
4. Apply different techniques to seek patterns in the data
5. Communicate qualitative findings effectively using displays

Course schedule

Day 1 – Foundations of QDA. The course opens with a lecture on the foundations of qualitative data analysis with definitions, history, problems, and challenges ahead. The qualitative analysis cycle is introduced as a heuristic device to understand that qualitative analysis often, if not always, occurs iteratively between the phases of data coding, seeking patterns, and results display. We then situate the phase of qualitative analysis within the research design and look at the influence that the research questions, the study purpose, and the type of data collected have on the choice of a method to analyse qualitative data. Our attention then turns to a number of popular approaches to QDA. In turn, the aim, specificities, and sampling requirements of thematic analysis, qualitative content analysis, grounded theory, cross-case analysis, and analytic induction are presented. The second half of the class is a workshop where participants set-up a NVivo project, import, organise, and classify data in preparation for day 2.

Day 2 – Data coding. The concepts and approaches to code qualitative data are introduced on day 2. In qualitative research, coding is the process by which data are segmented in coding units and assigned a code that captures what the data are about. Coding is a core task in qualitative analysis, so knowing how to code one's data meaningfully and efficiently is of key importance. The key concepts that shape the coding process, such as meaning and coding units, codes, codebook and coding scheme, are discussed alongside situations where descriptive, interpretive, and patterns codes are used to capture different levels of abstraction in the data. We then examine the properties of theme- versus design-based coding schemes and review their respective strengths and requirements. We conclude with the use of graphic displays to map coding networks and emerging relationships. A coding workshop with NVivo follows where participants put into practice the above concepts, and code text, multimedia, and social media data.

Day 3 – Seeking patterns. Day 3 presents the most common strategies to seek patterns and uncover relationships across the data, as the analytic process moves towards the generation of results and the formulation of conclusions. In qualitative analysis, seeking patterns may occur inductively while coding the data, deductively using retrieval techniques that tease out hypotheses from theory, or abductively in the search of an explanation that accounts for all cases observed. With this introduction, we move on and examine what a pattern is, how to recognize one in the data, and the role patterns play in weaving together cases, contexts, and attributes around a study conclusions. A hands-on session follows where patterns based on data overlap, proximity, sequence, nesting, and exclusion are sought and examined in NVivo. The class concludes with a discussion about the levels of abstraction in qualitative analysis and, most specifically, the level of abstraction that common qualitative designs (qualitative content analysis, thematic analysis, cross-case analysis, analytic induction and grounded theory) set to achieve.

Day 4 – Reporting findings. Day 4 covers the best and worst practices when reporting qualitative analysis and communicating research findings. We open the class with a discussion about the widespread problem in qualitative analysis which is the practice by which researchers present raw data only in the form of quotes, and often in excessive number, as study results. We clarify the difference between data, analysis, and findings, learn to differentiate coding devices from analytic tools, and offer suggestions about which information of the analysis process must be presented in which sections of research papers. The use of graphic displays to present qualitative findings is then introduced; in turn, we assess how models are best to illustrate conceptual integration, matrices are appropriate for cross-tabulated information, tables are suitable to present typology, and diagrams work well to depict structure. The second half of the class is a workshop on the visualization displays available in NVivo, where other features to export data and findings from a research project are also tried out.

Day 5 – Validating findings and master class. We start Day 5 with a discussion about the different techniques available to qualitative researchers to validate one's findings. We examine these strategies and comment on their appropriateness depending on the research context and the nature of the data collection. We pursue with a review of the debates surrounding the assessment of the quality of qualitative research and, more particularly, the phase of qualitative analysis. The second part of the class is dedicated to the master class where teams present in small groups the process and outcome of analysing a qualitative dataset of their own or from the sample data.

Assignment for ECTS credits

Participants can earn 2 ECTS credits by actively participating in class discussions and works. Two supplementary credits may be earned upon the production of daily assignments and an academic essay.

Day-to-day schedule (Monday 31 July – Friday 4 August)

	Topic(s)	Details
Day 1	Foundations of QDA <ul style="list-style-type: none">- History and problems with QDA- Influence of research design on QDA- Epistemology, methodology and QDA	9:00-10:30: lecture 10:30-10:45: break 10:45-12:00: lecture 12:00-12:30: workshop with NVivo
Day 2	Coding data <ul style="list-style-type: none">- Coding data: definition and concepts- Descriptive, interpretive, pattern codes- Theme vs design-based coding scheme	9:00-10:30: lecture 10:30-10:45: break 10:45-12:00: exercise on coding data 12:00-12:30: workshop with NVivo
Day 3	Seeking patterns <ul style="list-style-type: none">- Patterns: definition, types, roles in QDA- Induction, deduction, abduction in QDA- Levels of abstraction and QDA methods	9:00-10:30: lecture 10:30-10:45: break 10:45-12:00: exercise of seeking patterns 12:00-12:30: workshop with NVivo
Day 4	Reporting findings <ul style="list-style-type: none">- The problem of overreliance on quotes- Difference between data, analysis, results- Choosing the right display for your results	9:00-10:30: lecture 10:30-10:45: break 10:45-12:00: exercise on visualisations 12:00-12:30: workshop with NVivo
Day 5	Validating findings <ul style="list-style-type: none">- Techniques for validating findings- Quality of qualitative research Master class	9:00-9:15: course evaluation 9:15-10:30: lecture 10:30-10:45: break 10:45-12:30: team presentations

Day-to-day reading list

*Please note that pages numbers **in blue** refer to partial sections of chapters.

For those who will use NVivo during the week, the book by Bazeley & Jackson (2013). *Qualitative Data Analysis with NVivo*. Sage should be purchased as it is the technical reading text of the course.

	Compulsory readings
Day 1	Foundations of QDA <ul style="list-style-type: none">• Blaikie, N. W. H. (2010). Research Questions and Purposes (chapter 3 pp. 56-78). <i>Designing social research</i> (2nd ed.). Cambridge: Polity Press.• Gibson, W. J., & Brown, A. (2009). Introduction to qualitative data: analysis in context (chapter 1 pp. 1-14). <i>Working with Qualitative Data</i>. London: Sage.• Spencer, L., Ritchie, J., O'Connor, W., & Barnard, M. (2014). Analysis: Principles and Processes (chapter 10 pp. 269-293). In C. Ritchie, J. Lewis, C. M. N. Nicholls & R. Ormston (Eds.). <i>Qualitative Research Practice: A Guide for Social Science Students and Researchers</i>. London: Sage. Starting a project in NVivo (for those who will use NVivo) <ul style="list-style-type: none">• Bazeley, P., & Jackson, K. (2013). <i>Qualitative Data Analysis with NVivo</i> (chapters 2,3, 7,8). London: Sage
Day 2	Coding data <ul style="list-style-type: none">• Coffey, A., & Atkinson, P. (1996). Concepts and Coding (chapter 2, pp.26-45). <i>Making Sense of Qualitative Data</i>. Thousand Oaks: Sage.• Saldaña, J. (2009). Writing Analytic Memos (chapter 2 pp. 32-44). <i>The Coding Manual for Qualitative Researchers</i> (pp. 32-44). London: Sage.• Tesch, R. (1990). The Mechanics of Interpretational Qualitative Analysis (chapter 10 pp.113-134). <i>Qualitative Research: Analysis Types and Software Tools</i>. New York: Falmer Press.

	<p>Coding in NVivo (for those who will use NVivo)</p> <ul style="list-style-type: none"> Bazeley, P., & Jackson, K. (2013). <i>Qualitative Data Analysis with NVivo</i> (chapters 4,5). Idem.
Day 3	<ul style="list-style-type: none"> Bazeley, P. (2013). Comparative analyses as a means of furthering analysis (chapter 9 pp. 254-281). <i>Qualitative Data Analysis: Practical Strategies</i>. London: Sage. Miles, M. B., & Huberman, A. M. (1994). Making Good Sense: Drawing and Verifying Conclusions (chapter 10, p. 245 to p. 262 B. Tactics for Testing or Confirming Findings). <i>Qualitative Data Analysis: An Expanded Sourcebook</i> (2nd ed.). Thousand Oaks: Sage. <p>*Choose a <u>third reading</u> amongst those below based on your interests:</p> <ul style="list-style-type: none"> Theory generation: Bazeley, P. (2013). If...then...is it because? Developing explanatory models and theories (chapter 11, p. 327 to p. 345 Case-based strategies). Idem. Cross-case analysis: Bazeley, P. (2013). Relational analysis (chapter 10 pp. 282-296). Idem. Find patterns across codes: Bazeley, P. (2013). Relational analysis (chapter 10 pp. 296-310). Idem. <p>Using queries in NVivo (for those who will use NVivo)</p> <ul style="list-style-type: none"> Bazeley, P., & Jackson, K. (2013). <i>Qualitative Data Analysis with NVivo</i> (chapters 6,11). Idem.
Day 4	<p>Reporting findings</p> <ul style="list-style-type: none"> Bazeley, P. (2009). Analysing Qualitative Data: More Than Identifying Themes. <i>Malaysian Journal of Qualitative Research</i>, 2(2), 6-22. Available here Bazeley, P. (2013). If...then...is it because? Developing explanatory models and theories (chapter 11, p. 358 from Visual tools for theory building to p. 370). Idem. Bernard, H. R., & Ryan, G. W. (2010). Conceptual Models (chapter 6 pp. 121-142). <i>Analyzing Qualitative Data: Systemic Approaches</i>. Thousand Oaks: Sage. <p>Visualisations in NVivo (for those who will use NVivo)</p> <ul style="list-style-type: none"> Bazeley, P., & Jackson, K. (2013). <i>Qualitative Data Analysis with NVivo</i> (chapter 10). Idem.
Day 5	<p>Validating qualitative findings</p> <ul style="list-style-type: none"> Miles, M. B., & Huberman, A. M. (1994). Making Good Sense: Drawing and Verifying Conclusions (chapter 10, p. 262 from B. Tactics for Testing or Confirming Findings to p.277 C. Standards for the Quality of Conclusions). Idem. <p>Quality criteria for qualitative research</p> <ul style="list-style-type: none"> Lewis, J., Ritchie, J., Ormston, R., & Morrell, G. (2014). Generalising from Qualitative Research. <i>Qualitative Research Practice: A Guide for Social Science Students and Researchers</i> (pp. 347-366): Sage. Miles, M. B., & Huberman, A. M. (1994). Making Good Sense: Drawing and Verifying Conclusions (chapter 10, p. 277 from C. Standards for the Quality of Conclusions to p.280 D. Documentation). Idem.

Software and hardware requirements

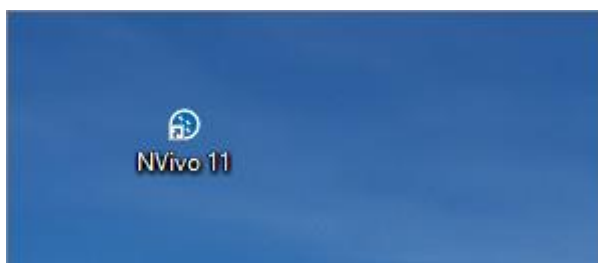
NVivo 11 Pro for Windows is used for the hands-on sessions in the course. Participants are invited to use NVivo or other qualitative software they're familiar with during the hands-on sessions. However, demonstrations as well as troubleshooting will solely be done for NVivo 11 Pro for Windows. The 14-day free trial of NVivo 11 Pro can be downloaded [here](#).

DO NOT COME TO THE COURSE WITH NVIVO FOR MAC. NVivo for Mac is incomplete compared to NVivo for Windows and has a different interface. Participants with a Mac should consult the compatibility options [here](#) to run NVivo 11 Pro using Boot camp, Parallels, or VMware Fusion.

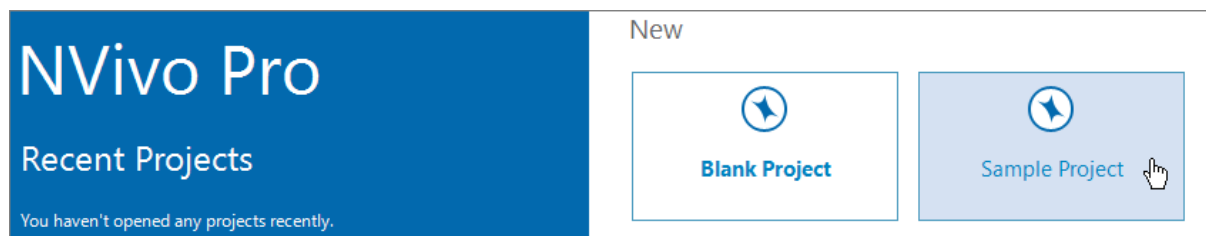
It is your responsibility to ensure that NVivo 11 works well on your laptop before the course as no troubleshooting will be provided during or outside teaching hours by the instructor, teaching assistant, ECPR staff, or CEU IT services.

Once NVivo is installed on your laptop, verify that it works properly. Follow the instructions below.

1. On your Desktop, launch NVivo by clicking on the **NVivo 11 shortcut icon**.



2. On the Start screen, in the **New** section, click **Sample Project**.



3. NVivo opens a copy of the sample project which is stored in your default project location.
4. If you can't open the Sample project, contact QSR international by submitting a [support request form](#) online (see section **Contact Us Online** at the bottom).

NVivo hardware requirements - as per [QSR International](#)

	Minimum	Recommended
Processor	1.2 GHz single-core processor (32-bit) 1.4 GHz single-core processor (64-bit)	2.0 GHz dual-core processor or faster
Memory	2 GB RAM or more	4 GB RAM or more
Display	1024 x 768 screen resolution	1680 x 1050 screen resolution or higher
Operating system	Microsoft Windows 7	Microsoft Windows 7 or later
Hard disk	Approximately 5 GB of available hard-disk space (additional hard-disk space may be required for NVivo project data)	Approximately 8 GB of available hard-disk space (additional hard-disk space may be required for NVivo project data)

Literature of qualitative data analysis

- Bazeley, P. (2013). *Qualitative Data Analysis: Practical strategies*. London: Sage.
- Bernard, H. R., & Ryan, G. W. (2010). *Analyzing Qualitative Data: Systemic Approaches*. Thousand Oaks: Sage.
- Boeije, H. R. (2010). *Analysis in Qualitative Research*. London: Sage.
- Boyatzis, R. E. (1998). *Transforming Qualitative Data: Thematic Analysis and Code Development*. Thousand Oaks: Sage.
- Coffey, A., & Atkinson, P. (1996). *Making Sense of Qualitative Data: Complementary Research Strategies*. Thousand Oaks: Sage.
- Dey, I. (1993). *Qualitative Data Analysis: A User-Friendly Guide for Social Scientists*. London: Routledge.
- Flick, U. (Ed.). (2014). *The Sage Handbook of Qualitative Data Analysis*. London: Sage.
- Gibson, W. J., & Brown, A. (2009). *Working with Qualitative Data*. London: Sage.
- Grbich, C. (2013). *Qualitative Data Analysis: An Introduction* (2nd ed.). London: Sage.
- Harding, J. (2013). *Qualitative Data Analysis: From start to Finish*. London: Sage.
- Kawulich, B. B. (2004). Data analysis techniques in qualitative research. *Journal of Research in Education*, 14(1), 96-113.
- LeCompte, M. (2000). Analyzing Qualitative Data. *Theory Into Practice*, 39(3), 146-154.
- Leech, N. L., & Onwuegbuzie, A. J. (2007). An Array of Qualitative Data Analysis Tools: A Call for Data Analysis Triangulation. *School Psychology Quarterly*, 22(4), 557-584.
- Miles, M. B., & Huberman, A. M. (1994). *Qualitative Data Analysis* (2nd ed.). Thousand Oaks: Sage.
- Richards, L. (1998). Closeness to Data: The Changing Goals of Qualitative Data Handling. *Qualitative Health Research*, 8(3), 319-328.
- Ritchie, J., Lewis, J., Nicholls, C. M. N., & Ormston, R. (Eds.). (2014). *Qualitative Research Practice: A Guide for Social Science Students and Researchers*: Sage.
- Ryan, G. W., & Bernard, H. R. (2003). Techniques to Identify Themes. *Field Methods*, 15(1), 85-109.
- Sandelowski, M. (1995). Qualitative Analysis: What It Is and How to Begin. *Research in Nursing & Health* 18(4), 371 -375.
- Saldaña, J. (2009). *The Coding Manual for Qualitative Researchers*. London: Sage.
- Spradley, J. P. (1979). *The Ethnographic Interview*. Fort Worth: Holt, Rinehart and Winston.
- Strauss, A. L. (1987). *Qualitative Analysis for Social Scientists*. New York: Cambridge University Press.
- Thomas, D. R. (2006). A General Inductive Approach for Analyzing Qualitative Evaluation Data. *American Journal of Evaluation*, 27(2), 237-246.
- Tesch, R. (1990). *Qualitative Research: Analysis Types and Software Tools*. New York: Falmer Press.
- Westbrook, L. (1994). Qualitative Research Methods: A Review of Major Stages, Data Analysis Techniques, and Quality Controls. *Library & Information Science Research*, 16(3), 241-254.

Lecture room requirement

Seminar style with movable chairs

Preferred time slots

Morning, please

Other recommended courses (before or after this course)

The following other ECPR Methods School courses could be useful in combination with this one in a 'training track'. NB this is an indicative list.

Before this course:

	Course title	Summer School	Winter School
1	Research designs	X	
2	Introduction to Interpretive Research Designs	X	
3	Expert Interviews for Qualitative Data Generation	X	
4	Analysing Discourse – Analysing Politics	X	
5	Introduction to NVivo for Qualitative Data Analysis	X	X

After this course:

	Course title	Summer School	Winter School
1	Advanced Qualitative Data Analysis		X