

Session 2: Integrating the Five- Level QDA[®] method into CAQDAS teaching: examples in ATLAS.ti and NVivo

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Presentation Overview

- ❏ Background and Context of Teaching and Support
- ❏ Integrating 5LQDA:
 - ❏ pre-emptive work
 - ❏ Further development
- ❏ Student Responses, Experiences and Feedback
- ❏ Teaching Reflections
- ❏ Limits and Opportunities – where next?

Quick Intro

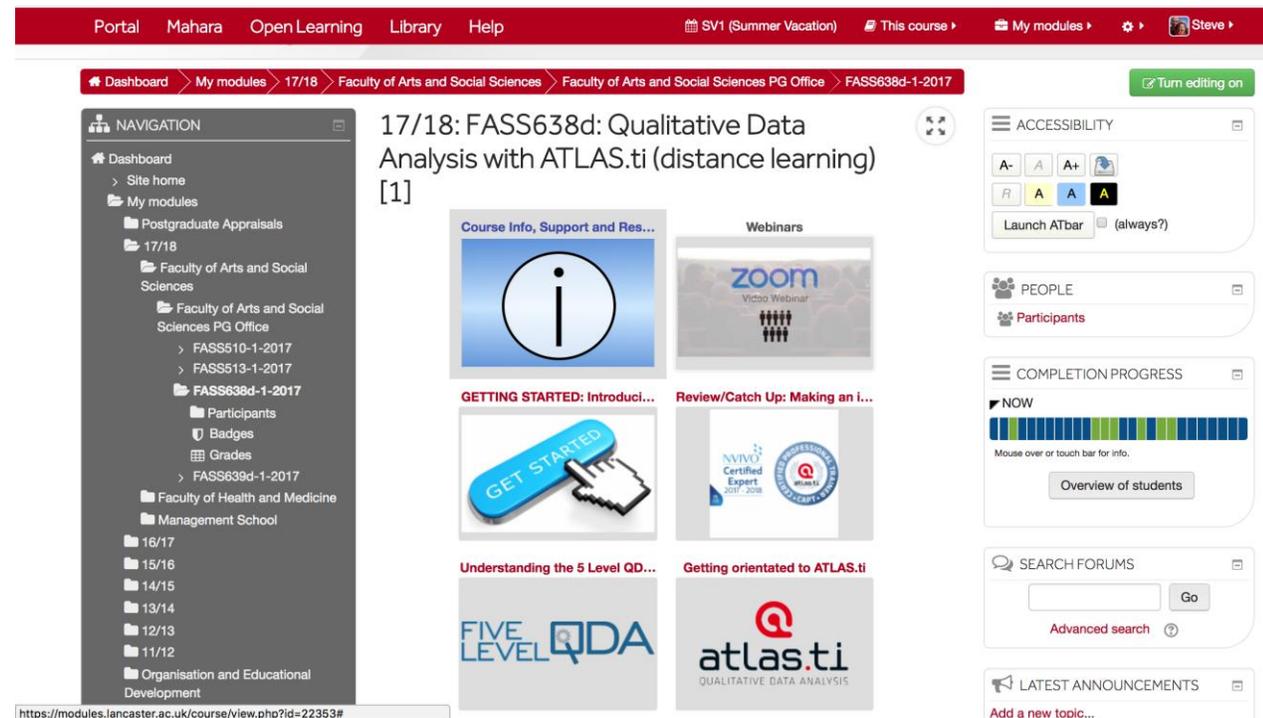
Who am I?

- Learning Technologist at Lancaster University in Faculty of Health and Medicine
- Independent CAQDAS consultant www.caqdas.co.uk
- PhD In Technology Enhanced Learning (Oct 2014) – used ATLAS.ti
- Senior ATLAS.ti Trainer
- NVivo Certified Expert
- Undertaking research project on CAQDAS use



Course Delivery

- 🔍 Courses designed and delivered in “Fully Blended” Mode
 - 🔍 Taught sessions in classroom with a live link for remote participants
 - 🔍 Recordings available afterwards
 - 🔍 Bookable one-to-one sessions either face-to-face or via Zoom
 - 🔍 Focus on individual project, planning, tasks, components
 - 🔍 Audience allowed + segments of session recorded and shared
 - 🔍 Remote screen share / presentation enabled
 - 🔍 Remote control of desktops via Zoom.



Portal Mahara Open Learning Library Help SV1 (Summer Vacation) This course My modules Steve

Dashboard My modules 17/18 Faculty of Arts and Social Sciences Faculty of Arts and Social Sciences PG Office FASS638d-1-2017 Turn editing on

17/18: FASS638d: Qualitative Data Analysis with ATLAS.ti (distance learning) [1]

NAVIGATION

- Dashboard
- Site home
- My modules
 - Postgraduate Appraisals
 - 17/18
 - Faculty of Arts and Social Sciences
 - Faculty of Arts and Social Sciences PG Office
 - FASS510-1-2017
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 - Faculty of Health and Medicine
 - Management School
 - 16/17
 - 15/16
 - 14/15
 - 13/14
 - 12/13
 - 11/12
 - Organisation and Educational Development

Course Info, Support and Res... Webinars

GETTING STARTED: Introduci... Review/Catch Up: Making an i...

Understanding the 5 Level QD... Getting orientated to ATLAS.ti

ACCESSIBILITY

PEOPLE

COMPLETION PROGRESS

SEARCH FORUMS

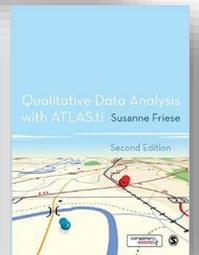
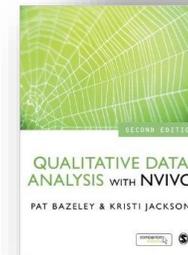
LATEST ANNOUNCEMENTS

https://modules.lancaster.ac.uk/course/view.php?id=22353#

Background and Context: The Course(s)

- ❏ Pilot workshop series used free online worksheets and datasets from Silver and Lewins (2014) together with sections from software-specific books >>>
- ❏ Developed into taught sessions for PhD Research Training Programme within different faculties on:
 - ❏ Making an informed choice of software (what they do, transcription, ATLAS.ti vs NVivo – differences / SWOT analysis)
 - ❏ Intro, Next Steps and Advanced (individual project consultation) for ATLAS.ti and NVivo
 - ❏ Developing my own model for working with the packages effectively

thinking about and using... be an essential companion researcher. Using a number of methods. Software provides practical in-depth research. Qualitative Research provides a step-by-step guide. Assisted Qualitative Data (CAQDAS). Christina Silver & Ann Lewins. An essential practice and principles of to the second edition.



My model for the doing (and avoiding traps) POETS

Workshop 1

POETS

Preparation

-  Preparing data for import

Organisation

-  Laying foundations for analysis
-  Creating a framework for writing, annotation and coding
-  Considering Cases

Exploration

-  Annotation
-  Visualisation

Workshop 2 + Consultations

POETS

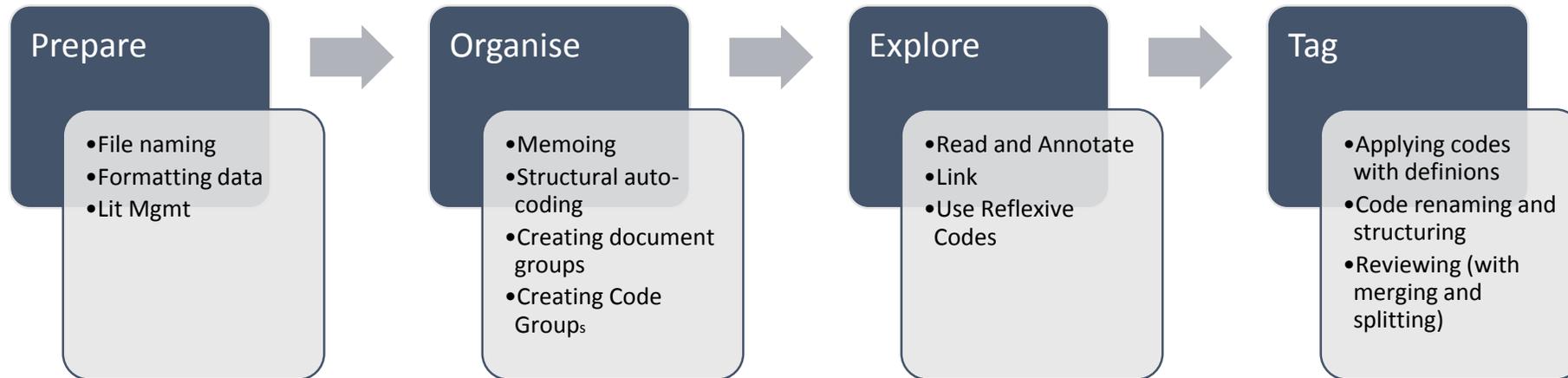
Tagging

-  Code structuring
-  Applying Codes

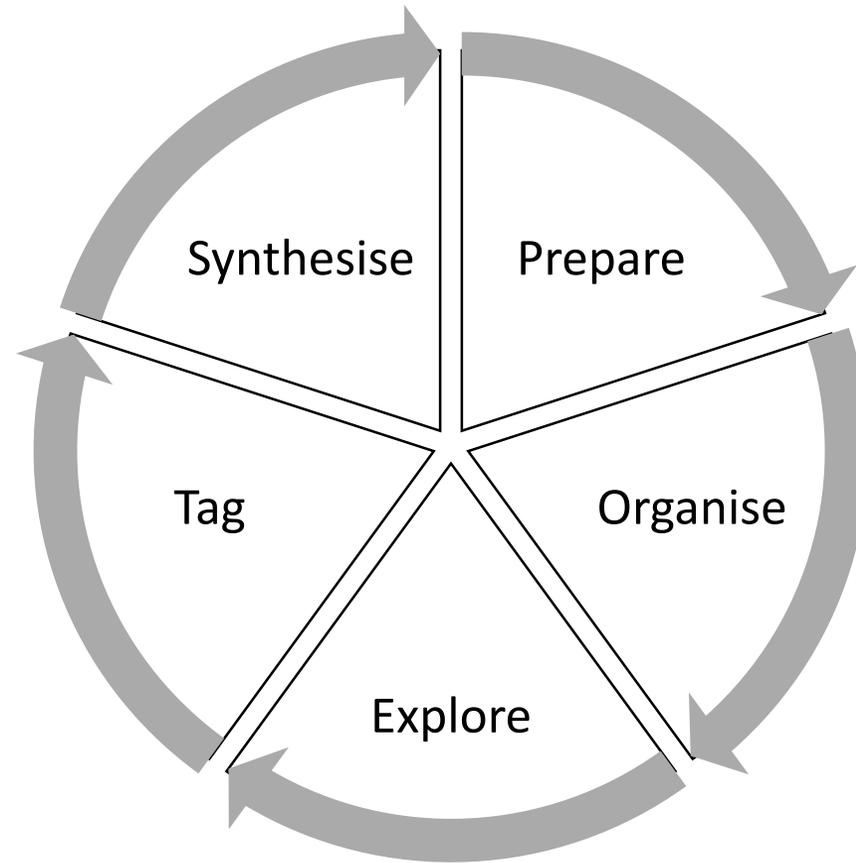
Synthesis

-  Exploratory queries
-  Co-occurrence trees and tables
-  Exporting reports

Initial stages – starting a project (Workshop 1)



Later stages of project development (Workshop 2 + Consultations)



The missing bit/s...

Why are you doing things?

Advantages

- ❏ Students like structure and want to avoid pitfalls and have effective tricks
- ❏ Sequential but not restrictive
- ❏ Majority of projects have very similar research designs (12 +/-2 interviews, thematic or GT analysis)
- ❏ Based in experience and expert recommendations
- ❏ Emphasises the things that are often skipped over (preparation, exploration, annotation)

Disadvantages

- ❏ Mechanistic? Simplistic?
- ❏ Doesn't connect practices clearly to theoretical or conceptual framework
- ❏ Can appear to be a recipe
- ❏ Doesn't really explore or focus on "why"
- ❏ Shows and Tells rather than encouraging exploration and critical consideration.
- ❏ Lacking:
 - ❏ Something "higher" (conceptual)
 - ❏ Something "before and after" (*thinking* about "what next?")
 - ❏ Something to frame it all

Integrating 5LQDA: Pre-emptive work

- 🗨️ Initially, in 2015, introduced the outline model with publication of: Silver, C., & Woolf, N. H. (2015) article - and using concepts and emphasising model >
- 🗨️ Explored using worksheet ...
 - 🗨️ Good idea – NEEDS context!

<i>FIVE-LEVEL QDA</i>				
<i>two levels of strategy >>>> translated to >>>> two levels of tactics</i>				
<i>Level 1</i>	<i>Level 2</i>	<i>Level 3</i>	<i>Level 4</i>	<i>Level 5</i>
<u>Objectives:</u>	<u>Analytic plan:</u>	<u>Translation:</u>	<u>Selected tools:</u>	<u>Constructed tools:</u>
The purpose and context of a project, usually expressed as a research question and methodology	The conceptual framework and resulting analytic tasks	Translating from analytic tasks to software tools, and translating the results back again	Individual software operations used in a straightforward way	Combinations of software operations, or software operations used in a custom way

Figure 2. *Five-level QDA.*

Integrating 5LQDA: As Core Course Design

- ❏ With publication of books and revisions to a course chose to move to a more thorough integration for 2018
- ❏ KEY BENEFIT: A common framework for exploring different CAQDAS packages
 - ❏ Avoids beauty contest / disciplinary affiliations from example projects
- ❏ Set up course to begin with APW and build from there
- ❏ Worked *really well* with those who engaged
 - ❏ Wonder if it intimidated those who planned less/felt broadly confused
 - ❏ Required a lot of reading – 3 chapters for p/t DL working students non-trivial
 - ❏ Caught some issues early and provided framework for providing advice

Student Feedback

- 🗨️ my only feedback would be how useful it is to first have an understanding of the really basic practical aspects of using NVivo before trying to then utilise the 5 Level method. So I would recommend having both books to hand (Woolf & Silver and Bazeley & Jackson) and cross referring between them as you go along with your project. What is really useful is having access to the booking system for one-to-one sessions with you

Student responses contd.

- 🗨 Here's my first go with the APW. Have found the general process really helpful in making me think about what I want to get out of my literature review. Also have found the book and videos very useful - even though I think I have read a couple of the chapters about 3 times each!

Limit or Opportunity? Selecting packages, not just components within them.

- ❏ However have ground to a halt on the more 'advanced' step of comparing and creating associations between my sources. What I want to do is to be able to say Research A (as documented in a journal article) is related to Research B (as documented in another journal article) for reasons such as follow-on study, influenced the methodology, is used to support latter's argument, is argued with etc. I think I might be heading to a PROJECT MAP but am not sure how to make the connections?
- ❏ BTW - I am using a Mac which I think slightly restricts a couple of options.

Teaching Reflections

- ❏ APW – when engaged with - helps students to clearly set out their aims and thereby guide focus of instruction and support and providing advice on choices
 - ❏ Needs to be shown as a benefit – prep for this workshop is helping with that by identifying student quotes and comments to re-use in the future (and a demo project too)
- ❏ If used *prior* to software selection then can inform that choice (with support and advice)
 - ❏ However the detail that can come in APW may obfuscate this....
 - ❏ But the framework applied and common books support transition
- ❏ Demonstrates that thinking and planning are essential!

Some Challenges

- ❏ Can provide framework for “what to consider when choosing best package *for you*” but doesn’t particularly *guide* that.
 - ❏ However- that is good because localized expert knowledge still has a place!
- ❏ Students + researchers are *always* time-poor and want to know *how* in terms of:
 - ❏ What’s the best way?
 - ❏ OK, if not the best then foolproof way?
 - OK, how about lowest risk?
 - What does everyone else normally do / what is the convention?
 - ❏ These don’t map well to the “consider *all the components* and what they *could do*”
 - ❏ Instruction needs to hold these tensions in balance: to be non-restrictive yet supportive and context-sensitive
 - ❏ My approach has been and will continue to be to try and combine 5LQDA for the higher-level and exploratory with the POETS approach as a low-risk sequence

Next steps

- ❏ Integration at an earlier stage: do some planning before you choose package...
- ❏ “Conceptual Framework” has caused confusion – often FAR too high a level
 - ❏ Need to develop clearer strategies and activities to clarify and differentiate this from high-level “theoretical framework” and to support explication of this

Additional, New and Ongoing Challenges

- ❏ Constant change of software: terminology, interface etc
 - ❏ Component Orientation Videos and Screenshots out of date
 - ❏ Opportunity to create alternatives locally
 - ❏ *Potential to contribute collectively?*

References

- ❏ Silver, C., & Woolf, N. H. (2015). From guided-instruction to facilitation of learning: the development of Five-level QDA as a CAQDAS pedagogy that explicates the practices of expert users. *International Journal of Social Research Methodology*, 18(5), 527-543.
- ❏ Silver, C., & Lewins, A. (2014). *Using software in qualitative research: a step-by-step guide (2nd ed. ed.)*. Los Angeles: SAGE.
- ❏ Woolf, N.H., & Silver, C. (2018) *Qualitative Analysis with ATLAS.ti / MAXQDA / NVivo: The Five-Level QDA® Method*. Routledge.