Qualitative Research Primer & Introduction to QDA Software

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adapted from Dr. Zawadi Rucks-Ahidiana and Dr. Claudia von Vacano
originally developed for DH Summer Institute, commissioned by D-Lab/DH at Berkeley
D-Lab

- Its Okay Not to Know
- 280 workshops, 1,100 consultations, working groups
- About 6,000 scholars served per year
- Special research projects

Digital Humanities at Berkeley

- DH Council, DH Advisory Board, DH Partners
- DH Faire & DH Working Group
- 35+ Collaborative Research Projects
- More than 20 new courses & Minor/Certificate program
- Post-docs
- Stacy Reardon (DH Librarian)
Agenda

● Introduction of Facilitator & Participants

● Qualitative Research Primer
  ○ Review of Basic Concepts
  ○ Methodologies & Methods
  ○ UC Berkeley Resources

● Introduction to QDA Software +
  ○ QDA Software as a Tool for Coding & Analysis
  ○ Overview of Relevant Software Programs
  ○ Introduction to Primary QDA Software Programs
Introduction of Facilitators & Participants

Josué Meléndez Rodríguez
- Qualitative Research Lead at D-Lab
- PhD Student at School of Social Welfare
- Research on Social Wellbeing in/through Higher Education
- MA in Postsecondary Education & MSW in Macro Practice
- 10+ years of practice experience in social services and education

Participants
- Names
- Educational & Work Backgrounds
- Current Research
- Interests/Goals for Training
Agenda+ for Qualitative Research Primer

- Qualitative, Quantitative, & Mixed-Methods
  - Differences, Advantages, & Tensions
- Philosophical Considerations
  - Ontology - What is reality?
  - Epistemology - How can we know about reality?
  - Axiology - Whose knowledge has value?
- Theories & Frameworks
  - Tacit & Formal Theories
  - Conceptual & Structural Frameworks
- Systematic Flexibility
  - Determine Question(s)
  - Conduct Literature Review
  - Determine Methodology & Methods
  - Collect Data
  - Code & Analyze Data
  - Determine & Write Findings
  - Frame & Write Discussion
- Methodologies & Methods
- UC Berkeley Resources
Methodologies & Methods

Methodologies
- Case Studies
- Ethnographies
- Grounded Theory
- Phenomenologies
- Narratives

Methods
- Case Studies
- Ethnographic Methods
- Interviews
- Observations
- Text/Video/Picture Analysis
<table>
<thead>
<tr>
<th>Type</th>
<th>Methods</th>
<th>Description</th>
<th>Resulting Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Observation</td>
<td>Ethnography</td>
<td>Observations &amp; informal interviews over longer time periods as a member of observed group</td>
<td>Field notes, photos, audio/video</td>
</tr>
<tr>
<td>Participant observation</td>
<td>Observations over shorter time periods as member of observed group</td>
<td>Field notes, photos, audio/video</td>
<td></td>
</tr>
<tr>
<td>Non-participant observation</td>
<td>Observations over shorter time period as outsider to observed group</td>
<td>Field notes, photos, audio/video</td>
<td></td>
</tr>
<tr>
<td>Interview</td>
<td>Structured interviewing</td>
<td>Ordered interview questions with precise wording used for every interview</td>
<td>Transcripts, field notes, audio/video</td>
</tr>
<tr>
<td>Semi-structured interviewing</td>
<td>Interview questions &amp; order are not necessarily the same for every interview</td>
<td>Transcripts, field notes, audio/video</td>
<td></td>
</tr>
<tr>
<td>Unstructured interviewing</td>
<td>No predetermined interview questions</td>
<td>Transcripts, field notes, audio/video</td>
<td></td>
</tr>
<tr>
<td>Documents</td>
<td>Historic</td>
<td>Older electronic or paper textual or visual files</td>
<td>Pdfs, photos</td>
</tr>
<tr>
<td>Current</td>
<td>Historic</td>
<td>Recently created electronic or paper textual or visual files</td>
<td>Pdfs, photos, text files</td>
</tr>
<tr>
<td>Social Media</td>
<td>Web Scraping</td>
<td>Textual data from websites such as Twitter, Facebook, or blogs</td>
<td>Text segments, metadata</td>
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UC Berkeley Resources

D-Lab
- Workshops & Presentations
- Working Groups & Consultants
- Work Spaces

School of Public Health
- Community-Based Participatory Action Research (CBPAR)
- Critical Theories in Social Science Research (cross-listed with the Law School)

Graduate School of Education (GSE)
- Introduction to Qualitative Research
- Advanced Qualitative Research
- Year-Long Qualitative Research Seminar

Institute for the Study of Societal Issues (ISSI)
- Presentations
- Trainings
- Fellowships

Reading Recommendations

Paradigms of Research for the 21st Century: Perspective & Examples from Practice edited by A. Lukenchuk
Qualitative Inquiry & Research Design: Choosing Among Five Approaches by J. Creswell
Qualitative Data Analysis: A Methods Sourcebook by M. B. Miles, A. M. Huberman, & J. Saldaña
Qualitative Research: Bridging the Conceptual, Theoretical, & Methodological by S. M. Ravitch & N. Mittenfelner Carl
Qualitative Research Design: An Interactive Approach by J. Maxwell
Stanford Encyclopedia of Philosophy at plato.stanford.edu
The Coding Manual for Qualitative Researchers by J. Saldaña
Thinking Qualitatively: Methods of Mind by J. Saldaña

Other recommendations may be available based on field of study & methodological interests. Please check with facilitators.
Agenda for Introduction to QDA Software

- QDA Software as a Tool for Coding & Analysis
- Overview of Relevant Software Programs
- Overview of QDA Software Programs
  - ATLAS.ti
  - Dedoose
  - NVivo
  - MAXQDA
## QDA Software as a Tool for Coding & Analysis

### What It Does
- Structure & Organize
- Explore
- Annotate
- Memo
- Code & Retrieve
- Visualize

### What It Does Not
- Analytic Thinking
- Error-Free Auto Coding
- Eliminate Bias
- Advanced Quantitative Analysis

### Potential Benefits
- Can Deal with Large Data Sets
- Frees Time to Focus on Analysis
- Improves Validity/Auditability
- Improves Credibility (among some audiences)

### Potential Drawbacks
- Can Produce Nonsensical Findings
- May Create Pressure to Engage Excessive Features & Large Data Sets
- Requires Learning the Software
Overview of Relevant Software Programs

QDA Miner
HyperResearch
ANSWR
Transana
Aquad (open source)
Quirkos (visual exports)
Saturate (app-based)
## Pros
- Ability to Interlink Components
  - e.g., memos, comments, codes, coded segments
- Significant Manual Diagraming Options
- Great Mapping Tool
  - Google Earth is Embedded
- Customizable Interface
- Great User Support

## Cons
- Flat Coding
- Some Data Sources Not in Project
- Comparatively Complex Process to Facilitate Teamwork
  - No Automatically-Generated Scores for Intercoder Reliability

## D-Lab Support
- Consulting - NA
- Workshops - TBD
<table>
<thead>
<tr>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Intuitive Interface</td>
<td>● Larger Projects = Lower Speeds</td>
</tr>
<tr>
<td>● Allows for Weighing Codes</td>
<td>● Poor Internet Connection =</td>
</tr>
<tr>
<td>● Teamwork is Simple</td>
<td>Interrupted Work</td>
</tr>
<tr>
<td>○ Does Not Require Additional</td>
<td>● No Auto-Coding</td>
</tr>
<tr>
<td>Infrastructure, Shared Location</td>
<td>● Limited Query Options</td>
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<tr>
<td>● Internet Based</td>
<td>● Cannot Merge Projects</td>
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<tr>
<td>○ Easy to Access from Any Computer</td>
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<tr>
<td>○ No Difference Across PC, Mac, or</td>
<td></td>
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<tr>
<td>Chromebook</td>
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<tr>
<td>● Monthly Access</td>
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<tr>
<td>○ No Charge if Not Active</td>
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D-Lab Support
Consulting - by appointment
Workshops - TBD
## NVIVO

### Pros
- Accepts Most File Types
- Great Automated Data Visualization Tools
- Most Advanced Visual Coding Abilities
- Allows for Weighing Codes
- Available in Several Languages
- Can Import Social Media
- Integrates EverNote, EndNote, Survey Monkey, & OneNote

### Cons
- Steep Learning Curve
  - Interface May Not Feel Intuitive
  - Advanced Features May Clutter Control Options
- Time-Consuming Coding Process
- Comparatively Complex Process to Facilitate Teamwork

### D-Lab Support
- Consulting - by appointment
- Workshops - TBD
Pros

- Intuitive Interface
- Variety of Coding Colors
- Allows Weighing Codes
- Flexible Application for Different Methodologies
- Accepts Most File Types
- Great Automated Data Visualization Tools
- Semi-Customizable Interface
- Good Integration of Statistical Data for Mixed-Methods (not advanced stats)

Cons

- Comparatively Few Users
  - Translates to Less User Support
  - Less Likely to Find Collaborators Already Using the Program
- Comparatively Complex Process to Facilitate Teamwork

D-Lab Support
Consulting - by appointment
Workshops - 10/4, 10/18, & 11/1
Why Use MAXQDA?
- Reasonable License Prices
- Compatible with Many Data Sources
- Allows for Different Kinds of Research Projects
- Some Integration of Quantitative Data
- Identical Across Macs & PCs
- Great User Support

Why Choose a Different Program?
- Mapping & Connection of Metadata is Better in ATLAS.ti
- Teamwork Is Easier with Dedoose
- Manual Diagramming & Auto-Coding is Better in NVivo
Next session, on 9/20, focuses on creating and organizing codes.

Hope to see you soon!