



Teaching Qualitative Data Analysis with MAXQDA

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MAXDAYS
MAXQDA VIRTUAL CONFERENCE

Teaching Analysis or Software?

- It used to be that we were teaching folks to add software to their qualitative data analysis skillset
- Now most software learners are novice analysts
- I recommend teaching software in parallel
 - Overview of the process of analysis
 - Brief software demonstration
 - Applied practice (in class or homework)
 - Review and debrief

Course/Workshop Format

I usually use some combination of

- Lecture
- Discussion
- Software demonstration
- Analysis application

Example

- Overview lecture of tools and processes of analysis
- Discussion of articles with different analytic approaches
- Introduction to MAXQDA with fully built project
- Basic search with activation, review coded segments and memos (followed by discussion in pairs)

Laying the Foundation

Core lecture on Primary Data, Tools, Processes of data analysis
For Novice Learners

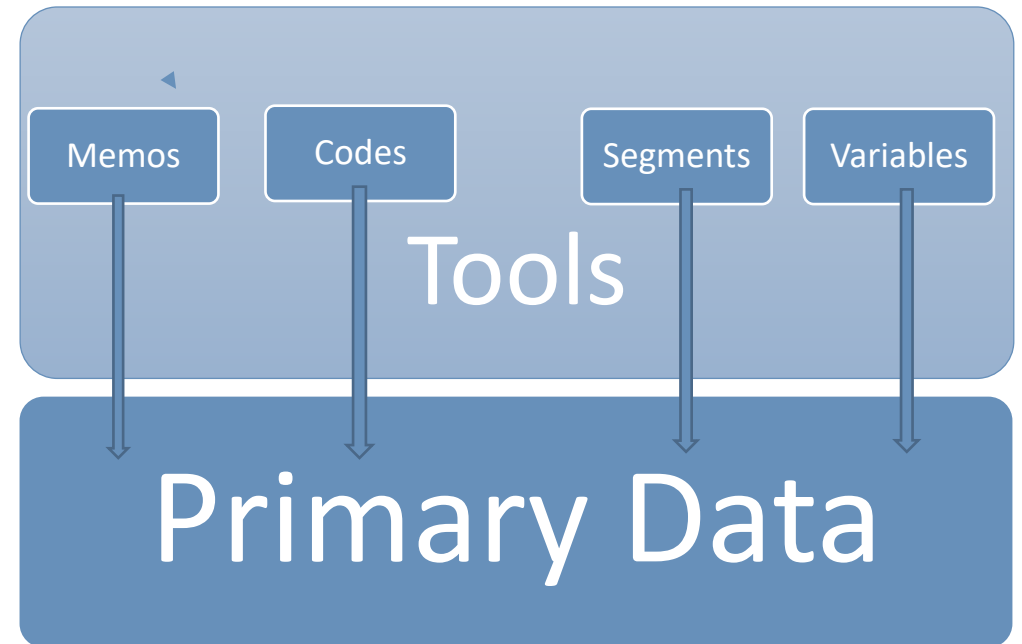
- Provides overview of content
- Explains key terms
- Introduces the notion of multiple processes of analysis (e.g. thematic analysis versus grounded theory)

For experienced researchers

- Establishes common vocabulary
- Makes explicit your approach and the potential for lack of consensus
 - What do we mean when we say “code,” “category,” “property,” “dimension?”

Tools of Analysis

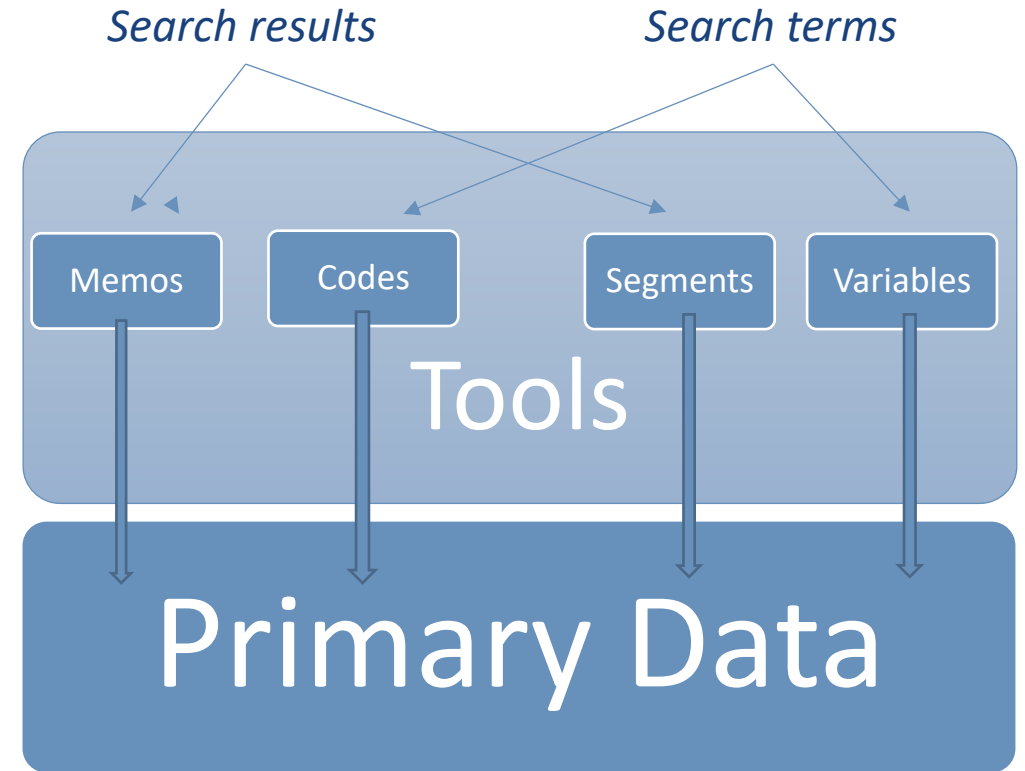
- **Memos:** Annotations – writing about the text you are reading – reflecting on meaning, themes, context, etc.
- **Codes:** labels you attach to text to index themes of interest in your data. *Search Terms*
- **Segments:** the block of text you highlight and then label with a Code: *the Unit of Analysis*
- **Variables:** Discrete information about participants or texts – not amenable to textual analysis. *Categories/types for Comparison*



Processes of Analysis

Retrieve, Review, Reflect, Reduce:

- Simple searches use **codes** as search terms to retrieve coded **segments** and related **memos** through *activation*
- Complex searches use **variables** as well as **codes** (and **code combinations**) to retrieve coded segments, compare the data to other groups (values on variables), and reduce patterns and variations into descriptive and comparative accounts



Empirical Articles

Demonstrate different approaches to analysis

- Memo-driven strategy
- Case-based analysis
- Thematic Analysis

Establishes different processes using same tools

Demonstrates transparent writing about analysis

Workshop strategies

In small groups

- Read in advance and discuss analysis in methods section
- Read methods section in workshop – small groups explain to each other

Overview of Fully Built Project

Allows full demonstration of key features and functions

- Don't overwhelm! Not a full software review
- Overview – not a point and click demonstration
- Orient learners to the program

- Four windows – opening, closing, rearranging
- Codes and coding stripes
- Segmentation (changing)
- Memos (documents, codes, text)
- Activation (basic)
- Activation by variables

MAXQDA Analytics Pro (24.0.0 Beta) GH543 PHRESH4 Dataset variables

Home Import Codes **Memos** Variables Analysis Mixed Methods Visual Tools Reports MAXDictio Stats TeamCloud

New Free Memo All Memos Free Memos Code Memos In-Document Memos In-Media Memos Document Memos Document Group & Document Set Memos Code Set Memos Overview of Memos Project Memo Search in Memos

Documents Alberto.doc (369 Paragraphs) Document 100%

Documents 247

- Focus Groups 0
- Interviews 247
 - Alberto.doc 73**
 - Daniel.doc 54
 - Marco.doc 72
 - Oliver.doc 48
- Sets 247

Codes 247

- condoms/contraception and pregnancy children 15
- C/C and P/C 15
- Condoms/Contraception and Pregnancy/Child... 15
- Arc of Relationship 32
- Condoms/Contraception 29
- Exclusivity 21
- Pregnancy/Children 23
- Relationship Nature/Quality 43
- Sex 38
- STD/HIV 16
- Sets 0

1 Interviewer: Today is February 7th, and I am talking to participant number 3331, and we're going to be talking about five partners PARTNER 1, PARTNER 2, PARTNER 3, PARTNER 4, PARTNER 5. Before we start talking about these specific relationships, tell me a little bit about sort of before all of this – growing up, where did you get your ideas about sex from, and relationships?

2 Participant: Most of what I know is from high school and just personal research. Lucky I had a computer since I was in ninth grade, so that's when I just went on my own and looked it up.

3 I: And that's stuff about birth control, or about sex, or relationships?

4 P: That was sex. Birth control, I just knew about the condom, and that was a sex ed class in high school, which was about tenth or eleventh grade. Never got the talk from the parents.

5 I: Why do you think that is?

6 P: Part of it is a language barrier, my parents both speak Spanish. I was raised in English schools so it was like they didn't know how to communicate to me about anything really. So there was a language barrier, I guess what it uncomfortable – there's also that strict Catholic upbringing that they had. And even though I was the youngest sibling, I didn't get any help from my siblings either, so it was just me on my own.

7 I: How far apart in age are your siblings from you?

8 P: From me to my oldest brother is 12 years, then there's two more in the middle.

9 I: So how much older are they?

10 P: This brother is 12 years older, my sister is 10 years older, and my other brother is five years older than me.

11 To Close. So some of them were with the... kind of adults by the time you were in high school?

Retrieved Segments

75°F Sunny 11:25 AM 9/4/2024

Practical Considerations

Course/Workshop Structure

Course/Workshop Data

It is essential for your students to practice skills with real data!

- I provide secondary data for at least the first half of a course
 - With their own primary data, learning depends on the quality of the data
 - Secondary data allows you to model team-based analysis exercises
- If using a client's data for a workshop
 - Is the data rich/thick enough to demonstrate concepts and skills?
 - Can you become familiar enough with the data to develop meaningful exercises and discussion?
- I use a dataset with 4 life history interview transcripts.
 - Each learner focuses on one transcript (5-6 learners per transcript)
 - We alternate between individual software practice and team-based analysis discussions

Course Planning Logistics

I usually think in terms of 3-hour blocks

- Weekly for semester-long courses
- Self-contained sessions for short courses
 - 5-day course = Ten 3-hour blocks
 - 2-day course = Four 3-hour blocks

MIX IT UP!!!

Each 3-hour block:

- Maximum 60-75 minute lecture (shorter is better!)
- 10-15 minute structured software demonstration (follow along)
- 15-60 minute software practice (use class/workshop time wisely!)
- 10-30 minute discussion
- *10-15 minute break!*

Linear versus Iterative Processes

Learners often want a linear description of how to do qualitative data analysis

- Of course the actual process is much more iterative
- It can be helpful to note that the process is not linear, but outline the course in linear fashion for the sake of teaching and practicing skills.
- Also return to the more iterative nature of the process toward the end of the course and re-contextualize what they've been learning in terms of other approaches and processes
 - E.g. Grounded Theory versus Thematic Analysis

Starting with Memos

Memos are perhaps the most under-used tool of QDA, but this is a great way to get learners to interact with course data

- Interactive lecture with oral practice, write-down exercises, and discussion
- Lab: 5-10 minute demonstration of how to write text memos only
- I give learners a “clean” project – with data only and they practice writing memos on one transcript for ~30 mins
- Briefly describe the difference between Merge and Teamwork functions. Have them export teamwork and then save *both* their project and teamwork file in a shared folder.
- After combining all the files, learners review and discuss memos with others reviewing the same transcript (beginning to think about themes)

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Documents

Documents	247
Focus Groups	0
Interviews	247
Alberto.doc	73
Daniel.doc	54
Marco.doc	72
Oliver.doc	48
Sets	247

Codes

Codes	247
Sets	0

Alberto.doc (369 Paragraphs)

Document 100%

1 Interviewer: Today is February 7th, and I am talking to participant number 3331, and we're going to be talking about five partners PARTNER 1, PARTNER 2, PARTNER 3, PARTNER 4, PARTNER 5. Before we start talking about these specific relationships, tell me a little bit about sort of before all of this – growing up, where did you get your ideas about sex from, and relationships?

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Memo 605

Never got "the talk" from the parents. He had to learn on his own, between school health ed classes and the internet.

Developing Concrete Examples

Many analysis tasks are relatively abstract and can be difficult for learners to understand when framed in the abstract.

- Don't be afraid of developing concrete examples – especially if they are a little bit silly and will be memorable later!

My favorite example: Hawaiian Shirts

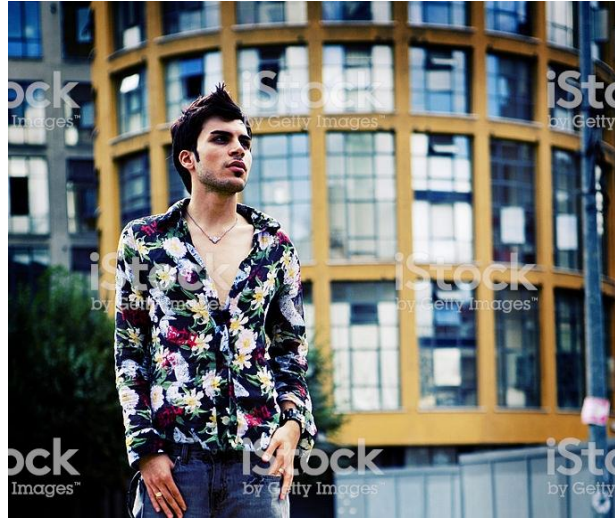
- I use this example after discussing themes in the data to illustrate the importance of code definitions
- The scenario: You are the costume designer for a theater production of an old Elvis movie. Your buyer is going to a nearby city to purchase Hawaiian shirts for the production and needs instructions on what to buy.

What is a Hawaiian Shirt?

Hawaiian Shirts!



Hawaiian Shirts!



Hawaiian Shirts: Defining Codes

I use this example after discussing themes that we have begun to identify in the data and an attempt to define codes.

- White Board: Ask learners to generate a list of criteria and decide which elements must be present for the buyer to identify appropriate shirts
- Interact with Data: Provide pictures of a number of Hawaiian Shirts (e.g. according to google), and ask learners to discuss why they would or would not “buy” each shirt for the production.
- Interact with More Data: I like to also provide examples of shirts **on people** to demonstrate that context matters.
- Finally, I change the scenario: You are holding a themed birthday party for your 75-year old uncle. Who would you turn away from the party? (The research question also matters)

Codebook Development

Brainstorm themes and discuss possible codes and definitions
(Reiterate: Codes *operationalize* themes)

- I aim for 8-10 codes in a regular class. I often propose that we use some codes/definitions that were originally developed for these data
 - Definitions are generally good, but vary in simplicity/clarity
 - We always identify 2-3 “new” codes; I work to develop relatively “bad” definitions for one or two
 - It is important to learners to know what it feels like to try to apply poorly defined codes!
- Learners code their transcripts, export teamwork, and then when all files are combined, they review and discuss discrepancies in code application and ways to improve definitions (and inclusion/exclusion criteria)

New Project Open Project Reset Activations Logbook Teamwork Merge Projects Save Project As Save Anonymized Project As Project from Activated Documents External Files Archive Data

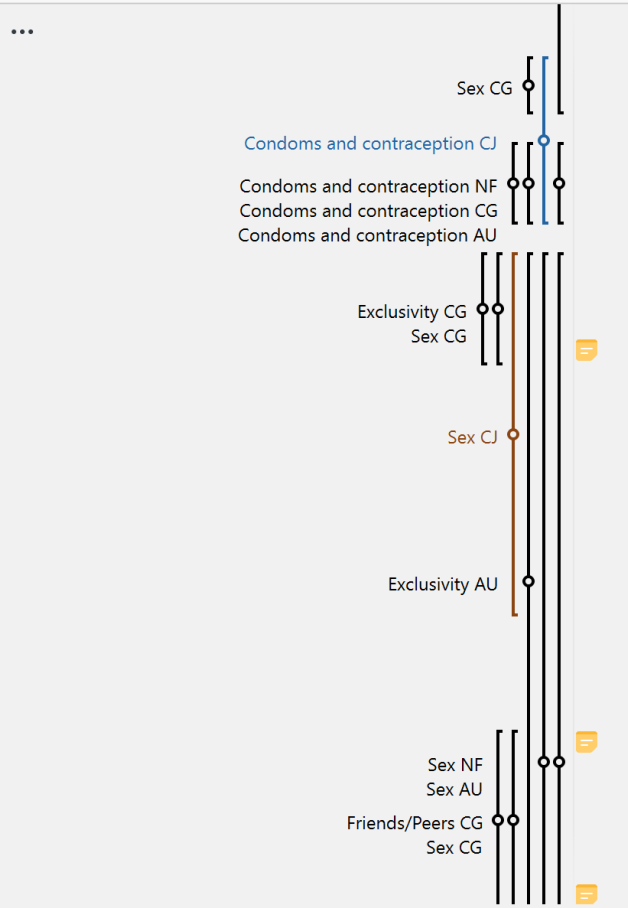
Documents

Documents	1642
Interviews	1642
Alberto.doc	395
Daniel.doc	307
Marco.doc	471
Oliver.doc	469
Sets	0

Codes

Codes	1642
Alcohol Use TR	4
Condoms and contraception AF	37
Condoms and contraception AK	8
Condoms and contraception AU	16
Condoms and contraception BB	12
Condoms and contraception CG	17
Condoms and contraception CJ	23
Condoms and contraception DA	5
Condoms and contraception DP	1
Condoms and contraception Jacob	15
Condoms and contraception joan	9
Condoms and contraception JW	11
Condoms and contraception LA	23
Condoms and contraception MR	6

Marco.doc (390 Paragraphs) Document 100%



119 I: Like—

120 P: The only decision there was was for me to go over and have sex with her.

121 I: Okay. And what about the using condoms?

122 P: That was my decision.

123 I: Okay. Were you ever with anybody else while you were with her ?

124 P: Yeah, I was at a party and had sex with this one girl one night.

125 I: Okay. Was that important?

126 P: No.

127 I: Okay. Does she know about it?

128 P: I don't think so, they were friends, but I don't think they ever talked about it.

129 I: Was it something you were trying to keep a secret or would you have cared if she had found out?

130 P: I really didn't care. People knew, people walked in. After I was done, I walked out to use the bathroom, people walked in and saw her in bed, so that whole party knew she had sex with somebody and figured it was me because I was gone for half an hour or 45 minutes. That night, people came up to me to ask me. People next week all week you know asked me about it

MAXQDA Analytics Pro (24.0.0 Beta) Coding Class File

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New Project Open Project Reset Activations Logbook Teamwork Merge Projects Save Project As Save Anonymized Project As Project from Activated Documents External Files Archive Data

Documents Documents 1642 Interviews 1642 Alberto.doc 395 Daniel.doc 307 Marco.doc 471 Oliver.doc 469 Sets 0

Condoms and contraception YZ

Condoms and contraception CJ
 Condoms and contraception NF
 Condoms and contraception CG
 Condoms and contraception AU

Condoms and contraception DP 1
 Condoms and contraception Jacob 15
 Condoms and contraception joan 9
 Condoms and contraception JW 11
 Condoms and contraception LA 23
 Condoms and contraception MR 6
 Condoms and contraception NA 4
 Condoms and contraception NF 10
 Condoms and contraception TR 20
 Condoms and contraception TT 7
 Condoms and contraception YZ 4
 Cultural background AF 4
 Cultural background AK 3
 Cultural background AU 3
 Cultural background BB 6

Document 100% AB

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Retrieved Segments

AZ - SF Video highlight

11:36 AM 9/4/2024

Identifying Properties and Dimensions

Novice analysts often have difficulty imagining different ways to describe/characterize coded data

- We discuss patterns and variations (typical patterns, spread)
- Properties and Dimensions are more difficult – describing “aspects” that can characterize coded data

Fruit Exercise: Can be done on paper or in MAXMAPS

On paper: print out pictures of fruit on index cards. Ask students in groups of 3-4 to do two things:

- Sort the fruit into piles representing categories (or properties): e.g. types (berries, citrus) or how they grow (tree, vine, ground)
- Identify an aspect that could be described on a continuum (dimension): e.g. sweetness or edibility of the skin

Fruit: Properties and Dimensions



Closing Workshop Activities

You have covered one example of analysis procedures (e.g. thematic)

- Talk through other procedures (e.g. Grounded Theory, Narrative Analysis)
- Review strategies for presenting data
- Return to analysis papers (from beginning) and assess analysis
- Assess the workshop (please do!)

Final Assignment

Brief Analysis of 4 transcripts

1. Write up overview of one code
2. Identify and describe one property or dimension of the code
 - Using MAXMAPS
3. Compare the data for two groups on that code
4. Describe an intersection with another code in the dataset

Thank You!!

Comments and Questions

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