Don’t let the software drive the process: The *Five-Level QDA* method for producing high-quality data analysis using ATLAS.ti

Nicholas Woolf and Christina Silver
Part 1

Nicholas Woolf
Genesis of the Five-Level QDA method

• 40 combined years observing students gain expertise

• Challenges in gaining expertise
  • Limited or superficial use
  • Stop using it when it could be most helpful
  • Allow software to drive the process
Addressing the challenges

• A method for harnessing ATLAS.ti powerfully

• A pedagogy that transcends methodology or software

• Unpacking the black box of expertise
The first principle

• Strategies are different from tactics
  • “An alternative search strategy is to select a sample of journals and to search for articles...this tactic was employed...”
  Bryman, A. (2006). Integrating quantitative and qualitative research: How is it done? Qualitative Research 6(1), 97-113

• Strategies: What you plan to do
  • Driven by projects objectives and research question
STRATEGIES
what you plan to do

OBJECTIVES
Overall purpose and context of project

expressed as:
RESEARCH QUESTIONS

and...

METHODOLOGY

Analytic methods

Data collection methods

ANALYTIC PLAN
Conceptual Framework leads to Analytic Tasks
The first principle

• Strategies are different from tactics
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• Strategies:  *What you plan to do*
  • Driven by projects objectives and research question

• Tactics:  *How you plan to do it*
  • Highlighters, whiteboards, general purpose software, CAQDAS...
The second principle

• **Analytic strategies are contradictory to software tactics**

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**STRATEGIES**
what you plan to do

- The nature of qualitative data analysis is to varying degrees iterative and emergent
- The outcome of any analytic task does not always have a predictable effect on the next step of data analysis

**TACTICS**
how you plan to do it

- The nature of computer software is cut-and-dried
- The outcome of any software operation - such as selecting a menu item or clicking on a button - is fully predictable in advance

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**FIVE LEVEL QDA**
Managing the contradiction

- Avoiding the contradiction
- Compromising
Managing the contradiction

- Avoiding the contradiction
- Compromising
- Transcending the contradiction
  - Experts unconsciously transcend the contradiction between analytic strategies and software tactics by “translating” between them
  - The Five-Level QDA method unpacks the unconscious process of translation
Level 1: Objectives
These are needed to develop an analytic plan.

Level 2: Analytic plan
A plan to accomplish the objectives that ends with a series of specific analytic tasks to be accomplished.

Level 3: Translation
An initial overview of translation: A process of transforming the strategies - the analytic tasks - into the tactics to accomplish them.

Levels 4 & 5:
The outcome of translation is selecting or constructing software tools.

...and on to formulating the next analytic task...
The five principles of the Five-Level QDA method

• Strategies and tactics are distinct

• Analytic strategies and software tactics are contradictory by nature

• Avoidance or compromise are problematic ways to manage the contraction

• Transcending the contraction through translation

• Translation is always driven by analytic strategies
An overview of the process

• Work with software “components” rather than “features”
• Identify “analytic tasks” for translation
• Translate the units of the task to components of the software
• Five steps of translation
Part 2

Christina Silver
DEMONSTRATION

• What can happen when you let tactics drive strategies

• Thinking processes when ensuring strategies drive tactics

• The same task can be accomplished using different tools
Project context: a literature review

OBJECTIVES
identify problematic areas of using software for QDA
→ develop relevant online support materials

FOCUS OF THE REVIEW
• how does the literature discuss issues in teaching, learning and using qualitative software?

ANALYTIC METHODS
• In-depth literature review – inductive thematic analysis
**ANALYTIC PLAN**

1. Gather seemingly pertinent articles (identified outside ATLAS.ti)
2. Narrow down the pool of literature (identify *actually* pertinent literature)
   - *Familiarize with literature*
   - *Organise literature according to relevance*
3. Inductive thematic analysis of pertinent literature
4. Interrogate the data to establish findings
5. Write a first draft of the literature review
6. Prepare the draft literature review
7. Plan the data analysis
Tactics for familiarization

- **Word cloud** – visualise frequent words
- **Word list** - count frequent words
- **Auto-code** – capture sentences/paragraphs where potentially useful words / phrases occur
TASK: NARROW DOWN POOL OF LITERATURE

PURPOSE
• develop an overview of the content of literature

PREVIOUSLY
• gathered large number of articles

LOOKING AHEAD
• identify relevance of each piece of literature using standardized criteria
Tactics for organizing according to relevance

• **Code** – to capture repeated aspects contained within review sections
  • could be done by auto-coding (if repeated aspects consistently referred to)
  • or re-coding parts of within in document
  • or re-coding within a network view

• **Assign to document groups** – to gather reviews according to relevance
Thank you...

To find out more
www.fivelevelqda.com

To contact us
info@qdaservices.co.uk

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