Qualitative Data Analysis for Social Research III

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**Source:** Denzin, N. K., & Lincoln, Y. S., Eds. (2000). *Handbook of qualitative research*. Sage

Publications, 437-440.

## **Comment 1**

**Quote/Paraphrase:** “I call a study an intrinsic case study if it is undertaken because, first and last, the researcher wants better understanding of this particular case…. I call it instrumental case study if a particular case is examined mainly to provide insight into an issue or to redraw a generalization. The case is of secondary interest, it plays a supportive role, and it facilitates our understanding of something else. The case still is looked at in depth, its contexts scrutinized, its ordinary activities detailed, but all because this helps the research to pursue the external interest” (p. 437).

**Essential Element**

This comment is associated with the essential elements Thematic Analysis and Drawing Meaningful Insights.

**Additive/Variant Analysis**

I found this distinction between intrinsic and instrumental case study to be very helpful in clarifying the purpose of my dissertation research. I agree that the qualitative case study that I will be doing with the leaders of DSG will be instrumental in providing insight into how deep change and transformation occurs in the context of a leadership community.

**Contextualization**

Our company, Transformed Leader, has facilitated over 25 Leadership Cohorts involving over 130 leaders and managers at the DSG Corporation during the past two years. I will be interviewing 15 of these participants to understand how they as leaders have changed through the 90-day experiential curriculum that we have developed. My primary goal is not to understand all of the particulars of their experience as a unique case, but to gain insight into the change process that by many reports was integrative and transformative for those leaders. My instrumental purpose is to understand how the experiential learning in these leader cohorts contributed to significant shifts in their mindsets, values, and identities.

## **Comment 2**

**Quote/Paraphrase:** A case study has a conceptual structure that is organized around a small number of questions that explore, analyze, and interpret complex issues. “Qualitative case researchers orient to complexities connecting ordinary practice in natural habitats to the abstractions and concerns of diverse academic disciplines. The broader purview is applied to the single case but does not replace it as focus” (p. 440).

**Essential Element:** This comment is associated with the essential elements Inductive Data Coding & Emergent Themes.

**Additive/Variant Analysis:** I agree that a tension exists between analyzing the data of a particular case and the generalization toward conceptual richness and explanatory power. The qualitative researcher must be aware of this tension and

maintain the integrity of the analytical and interpretive process. Grounded Theory is known for its rigor in working back and forth between coding the data, building themes, and testing an emerging theory. I will also need to hold the tension and not polarize between the description of the particular case and the building of generalized themes with a qualitative case study.

**Contextualization:** Consulting with a large, complex organization raises many issues that could be addressed in a qualitative case study. One such issue is how often a linear problem-solving process is applied to almost every organizational challenge. However, I have observed that underlying structural and systemic problems are rarely addressed. I want to identify the particulars in terms of how leader development has taken place through the 90-day Life Legacy Cohorts while also recognizing and analyzing the systemic patterns and themes that emerge from the culture as a whole.

**Source:** Merriam, S. B., & Tisdell, E. J. (2016). *Qualitative research: A guide to design and*

*implementation*. John Wiley & Sons, 38, 85.

**Comment 1**

**Quote/Paraphrase:** Merriam & Tisdell (2016) state that the single most defining characteristic of case study research lies in delimiting the object of the study,

which is the case (p. 38). The authors maintain that what makes a case study different from basic qualitative research is that it is a bonded system or a single entity in which there are boundaries. A case needs to be “fenced in” whether that is a single person, a program, a group, an institution, or a community. Therefore, a

qualitative case study is analyzing and interpreting a particular phenomenon occurring within a bounded system or context (p.38).

**Essential Element:** This comment is associated with the essential element “Inductive Data Coding & Emergent Themes.”

**Additive/Variant Analysis:** A case study is not just another way of describing qualitative research, but a particular type of research that is based on the phenomena studied within a bounded system. This comment added to my understanding of the contextual and focused nature of a qualitative case study. The phenomena that is being studied is limited to the specific context of where the experience of the participants has occurred. “If the phenomenon you are interested in studying is not intrinsically bounded, it is not a case” (p. 39).

**Contextualization:** My qualitative dissertation research will be done within a bounded system. DSG is a $1.3 billion retail sales and distribution company, a division of Ashley Furniture, that serves customers throughout the Midwestern United States. I will be doing a qualitative case study of how the executive leaders and managers of DSG have changed through experiencing a transformative leader development process. The anecdotal reports have been very encouraging about

the power and significance of the experiential work that was accomplished over a 2-year period at DSG. However, there has not been a formal study of the impact of that leader development process or to what degree deep change and transformation may have occurred. This particular case study will deepen my understanding of the critical learning pathways that led to leadership growth and

development and also gain insight on how to replicate that transformative experience in the future.

**Comment 2**

**Quote/Paraphrase:** “Just what is a theoretical framework? A theoretical framework is the underlying structure, the scaffolding or frame of your study. This underlying structure consists of concepts or theories that inform your study (Maxwell, 2013). The theoretical framework is derived from the orientation or stance that you bring to your study, and every study has one” (p. 85).

**Essential Element:** This comment is associated with the essential element of Drawing Meaningful Insights.

**Additive/Variant Analysis:** I agree with the need for an underlying conceptual framework that gives coherence and meaning to the qualitative data. Without that framework, the interpretation of the data would lack relevance, significance, and impact. Theoretical frameworks provide heuristic value and strategic insight for facilitating constructive social change.

**Contextualization:** My dissertation research will draw upon the theoretical framework of transformational learning (Mezirow, 1991) and my own theory of how deep change and transformation occurs within the four quadrants of Mind-Heart-Soul-Strength (Nicholson & Murray, 2021). I want to provide the research support for the experiential change process that my consulting firm provides in the context of a leadership community. We have gathered a lot of anecdotal evidence that transformation does occur through our change processes, but the

qualitative case study would provide greater credibility for our coaching and consulting work.

**Source:** Patton, M. Q. (2014). *Qualitative research & evaluation methods: Integrating theory*

*and practice.* Sage Publications, 542-3.

### **Comment 1**

**Quote/Paraphrase:** "The point of analysis is not simply to find a concept or label to neatly tie together the data. What is important is understanding the people studied. Concepts are never a substitute for direct experience with the descriptive data. What people actually say and the descriptions of events observed remain the essence of qualitative inquiry. The analytical process is meant to organize and elucidate telling the story of the data.  Indeed, the skilled analyst is able to get out of the way of the data to let the data tell their own story" (p. 545).

**Essential Element:** This comment is associated with the essential element Thematic Analysis.

**Additive/Variant Analysis:** I strongly agree with Patton's (2014) admonition that the analyst must get out of the way so that the data can faithfully describe the stories and perspectives of the people.  Conceptualization of the data is not truly qualitative analysis unless it accurately describes the lived experience of the participants.

**Contextualization:** Conceptualizing and theory building come easily to me and therefore I can miss the real essence of the leadership cohort experience for the people who participated in it. I must focus on open coding and inductive analysis

in the early stages of the research to keep from building constructs, themes, and theories prematurely without being grounded in the data.

## **Comment 2**

**Quote/Paraphrase:** "Once patterns, themes, and/or categories have been established through inductive analysis, the final, confirmatory stage of qualitative analysis may be deductive in testing and affirming the authenticity and appropriateness of the inductive content analysis, including carefully examining deviate cases or data that don't fit the categories developed” (p. 542).

**Essential Element:** This comment is associated with the essential element Thematic Analysis and Data Coding.

**Additive/Variant Analysis:**Moving from inductive to deductive analysis is done after the open coding takes place, which produces the initial round of pattern recognition, emerging themes, and categories of thought. Then testing the

categories against the data, which is the constant comparative method, completes the qualitative analytical process for inductive data coding. I agree that the interactive process of moving from induction to deduction and then testing the validity of the constructs against the data is the fundamental analytical process of qualitative research.

**Contextualization:** “Dedoose” is an exceptional software tool for tracking the analytical interplay between induction and deduction in qualitative data analysis. Without a very a high level of information management provided by a software platform, it would be easy to get lost in the randomness of the data and not track

the emerging patterns and themes that surface through the open coding process. I plan on utilizing Dedoose software to analyze the fictional study, “Religiosity and Social Behavior in a Diverse Community” to fulfill the qualitative data assignment for COM 968. Learning and applying Dedoose in Core 5 will help prepare me for the qualitative data analysis in my dissertation case study.

## **Comment 3**

**Quote/Paraphrase:** "Inductive analysis involves discovering patterns, themes, and categories in one's data.  Findings emerge out of the data, through the analyst's interactions with the data. In contrast, when engaging in deductive analysis, the data are analyzed according to an existing framework. Qualitative analysis is typically inductive in the early stages, especially when developing a code book for content analysis or figuring out possible categories, patterns, and

themes. This is often called 'open coding' (Strauss & Corbin, 1998, p. 223), to emphasize the importance of being open to the data" (p. 542).

**Essential Element:** This comment is associated with the essential element Thematic Analysis and Data Coding.

**Additive/Variant Analysis:**Before this explanation by Patton (2014), I had not been clear about the term "open coding" that is often used in the context of Grounded Theory methods. I now understand open coding to mean the early inductive and analytical process of discovering patterns, themes, and larger categories in the qualitative data. I have a variant opinion about not using a theoretical framework to eventually categorize the data deductively. Grounded

Theory is very open and emergent in its process of developing early patterns and themes that finally leads to proposed or “grounded” theories. In contrast, I want to use the conceptual framework of transformational learning (Mezirow, 1991) and my own framework in the Human Operating System (Nicholson & Murray, 2021) to help identify the patterns and themes that emerge from the qualitative interviews in my research.

**Contextualization:**The early analysis of my research interviews needs to be inductive and "open" to the patterns and themes that are in the data. The challenge will be not "seeing" in the data the patterns that I already have developed in my mind through the consulting work that I have done and the framework that I developed in the Human Operating System (Nicholson & Murray. 2021). I will

need to bracket those insights and frameworks until later when they provide theoretical sensitivity to the interpretation of the data. I see the process as moving from emergent inductive analysis and then using the theoretical frameworks to deductively analyze the data to compare and contrast the interpretation the data with theory confirmation and construction.

**Source:** Salmona, M., Lieber, E., & Kaczynski, D. (2019). *Qualitative and mixed methods data*

*analysis using Dedoose: A practical approach*. Sage Publications, 16-105.

**Comment 1**

**Quote/Paraphrase:** “A well-articulated purpose statement supports each decision regarding a study design. Fieldwork decisions such as setting, sample population, data gathering and analysis all flow from your research purpose…. Looking at

what a purpose statement is not can be very helpful in identifying what it is. A purpose statement is not any of the following:

* A continuation of the social problem discussion
* A literature review
* a description of fieldwork methods
* A focus on central research question statement
* Reflections on our role as a researcher
* An Abstract

You have an agenda behind your choice of topic and the social problem(s) related to this topic. Explain this agenda by writing a well-crafted statement. As you do this, think about the following:

* Where do I want my path of inquiry to take me?
* What is the central point to my research?

Answering these questions will help you get started on crafting your purpose statement” (p.16-17).

**Essential Element:** This comment is associated with the essential element Thematic Analysis.

**Additive/Variant Analysis:** I found it very helpful to know about what a purpose statement is not. Even focusing on the central research question is not the essence of a purpose statement. Rather it is clearly stating the personal agenda behind pursuing the research. What is my thinking and perspective on the social problem that is being studied and why am I interested in researching it? Being transparent

about the purpose of my study is what will make my research unique and stand apart.

**Contextualization:** I have clarity about the purpose of my dissertation research. I want my case study to demonstrate the transformative power of experiential learning in the context of a committed leadership community. The qualitative data analysis of participant interviews will provide great insight and research support for utilizing deep change processes that we use in our consulting practice. Writing

2-3 pages about the purpose statement will be a challenging, but rewarding exercise as it provides a framework for guiding all aspects of the dissertation research.

## **Comment 2**

**Quote/Paraphrase:** “Memo writing is a research skill that must be applied early and often throughout a study to help manage data gathering and analysis. As memos are written and saved, they provide a documented audit trail of developing researcher insights and decisions. This is particularly critical as the growing complexity of a study progresses” (p. 52).

Memos can be managed by creating four distinct folders in Dedoose:

* Methods memos
* Reflective memos
* Analytic memos
* Inductive-deductive shifts memos

“Methods memos may be written any time a design issue is encountered or a modification in data gathering is considered. Reflective memos are similar to personal journals or diaries in which the researcher draws on distinct view and experiences. Analytic memos provide a means to capture and document preliminary interpretations and meanings. An inductive-deductive shifts memo is written each time the researcher intentionally applies inductive or deductive reasoning or unintentionally experiences a shift in reasoning. Together these four

types of memos document and support rich insights into the paradigm mixing process of the study and how analysis is evolving through interaction with the data” (p. 52)

**Essential Element:** This comment is associated with the essential element Inductive Data Coding and Thematic Analysis.

**Additive/Variant Analysis:** Using the features of Dedoose software to create ongoing memos is critical to the process of doing effective qualitative data analysis. I agree that these four categories, methods, reflective, analytic, and inductive-deductive shifts, will help to monitor and manage the emergent and interactive thought processes that need to be recorded and synthesized in my research.

**Contextualization:** My greatest concern in doing qualitative data analysis is losing track of the complex interpretations and manifold meanings of the data. It would be easy for me to feel like I am always starting over to build up momentum for a meaningful analysis. Being disciplined in writing up these 4 categories of

memos would eventually accrue toward achieving saturation in the interpretation of the data. The learning curve is steep in mastering Qualitative Data Analysis Software, but in the long run, it will save incredible time in capturing the full and rich meaning of the case study research.

## **Comment 3**

**Quote/Paraphrase:** “The potential misuse of theory bits during the data analysis process provides an excellent example of how credible research can be compromised. Theory bits are unsubstantiated points of meaning that the researcher has deductively drawn from a fragment of data (Patton, 2015, p. 589). Meaning from this fragment may distort analysis because a fragment can grab the researchers’ attention and sound and feel so correct. Qualitative research practices promote inductive inquiry that strives to avoid such premature deductive pitfalls in the interpretation of meanings. Through the adoption of sound qualitative practices, the researcher is better positioned to promote improvements in the reporting of credible evidence” (p. 105).

**Essential Element:** This comment is associated with the essential element Inductive Data Coding and Thematic Analysis.

**Additive/Variant Analysis:** I agree that there is a risk of conflating a bit or fragment of data into a larger theme or theory. I also know that a fragment of meaning can sometimes open the door to a theoretical breakthrough.

**Contextualization:** Given my background in counseling and psychotherapy, taking fragments of data to help clients gain insight into how critical events and

stories have shaped them is a very natural and ingrained practice. I must be careful to adhere to the disciplines of qualitative research to avoid quick conclusions based on isolated bits of data. At the same time, many years of

interpreting the meaning of client accounts have resulted in honing a highly developed skill. I believe that I am capable of holding the tension of doing disciplined qualitative research and at the same time, be open to interpretations of interview data that can support meaningful themes and theoretical contributions.

## **Source:** Yin, R. K. (2018). *Case study research and applications: Design and methods*. Sage

## Publications, Inc., 4-10.

**Comment 1**

**Quote/Paraphrase:** “How do I know if I should be doing case study research? There’s no formula, but your choice depends in large part on your research questions[s]. The more that your questions seek to *explain* some contemporary circumstance (e.g. ‘how’ or ‘why’ some social phenomenon works), the more that case study research will be relevant. Case studies…are relevant the more that your questions require an extensive and ‘in-depth’ description of some social phenomenon” (Yin, 2018, p. 4).

**Essential Element:** This comment is associated with the essential element Thematic Analysis and Thick Descriptions.

**Additive/Variant Analysis:** Yin (2018) makes the distinction between generalized case studies in various professions and case study research that involves a more rigorous qualitative data analysis and interpretation. He

emphasizes that one’s research questions are the key to exploring in depth the “why” or “how” of a social phenomenon in a specific context. I agree with Yin

that *case study research* requires a more extensive, “thick description” of a social phenomenon than what is generally produced as a professional case study.

**Contextualization:** The social phenomenon that I want to understand is “how” and “why” did the experiential learning component of the leadership cohorts that my company facilitated at Ashley Furniture produce such a significant change in the life and leadership of the participants. This research question is worthy of an in-depth case study that would provide deeper insight into the principles and processes of transformational learning. This kind of community learning experience is one of the value propositions of our consulting work and to provide the research support behind this change process would add further credibility to our company.

## **Comment 2**

**Quote/Paraphrase:** Yin (2018) proposes two types of research questions, one being exploratory focusing on the “what” and “where” aspects of a social phenomenon, and the second being explanatory that develops the “why” and “how” behind a line of inquiry. The “how” and “why” questions are more likely to lead to the use of case study research. “This is because such questions deal with the tracing of operational processes over time, rather than mere frequencies or incidence” (p. 10).

**Essential Element:** This comment is associated with the essential element of Drawing Meaningful Insights.

**Additive/Variant Analysis:** I like the distinction between exploratory and explanatory case study research. This gives me clarity that what I want to study is explanatory in nature, and that involves the why and how of a particular social phenomenon. I also agree that what I am researching is the “tracing of an operational process over time” and not an exploration and description of historical and transactional events.

**Contextualization:** The selection of the right participants for in-depth interviews will be very important for my dissertation research. I need to select the participants who were engaged in the transformative learning process and not just distant observers. There were 3-5 people in every cohort who volunteered for the experiential learning exercises, and they would provide great insight into how the exercises in the context of a leadership and learning community impacted them. There were also observers who shared what they learned about themselves from seeing a volunteer do his or her work. Both participants and engaged observers who appreciated the learning experience would be good candidates for personal interviews.

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