

# QUALITATIVE RESEARCH: Designing with Data Sources and Collection Methods in Mind

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# Agenda

- Basic Introduction
  - ✓ Qualitative Research Designs/Genres
  - ✓ Common Features Across Designs/Genres
- Qualitative Data Sources
  - ✓ 3 Types of Data Sources
  - ✓ Phenomenon of Interest & Data Sources
- Qualitative Data Collection Methods
  - ✓ Types of Collection Methods
  - ✓ Unit of Analysis vs. Unit of Coding
- Qualitative Research Design Examples

# BASIC INTRODUCTION

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- Qualitative Research Designs/Genres
- Common Features Across Designs/Genres



# Qualitative Research Designs/Genres

- **Turning Point: Qualitative interpretive research legitimized by Glaser & Strauss's (1967) grounded theory**
- Case study (convergent, explanatory, exploratory)
- Content analysis (qualitative using inductive and deductive logic)
- Discourse analysis/Critical discourse analysis
- Visual arts-based (i.e., photovoice)
- Ethnography/autoethnography
- Mixed methods (qualitative + quantitative)
- Oral history
- Phenomenology/phenomenography (shared lived experiences based on perceptions/conceptions about a phenomenon)
- More than 20 documented research designs/genres

# Common Features Across Designs/Genres

Data Sources (Unit of Analysis)	Collection Methods (Related to Unit of Coding)	Analysis Methods
People (individual, dyad, group)	Interviews, focus groups, observations, essay/diary/journal/memoir/biography, video/photo	<ul style="list-style-type: none"> <li>• Open coding: fracturing data into separate pieces and constructing code categories</li> <li>• Axial coding: putting data back together in new ways after open coding</li> <li>• Thematic analysis</li> <li>• Constant comparison (GT)</li> <li>• Theoretical sampling (GT)</li> <li>• Selective (focused) coding (GT)</li> </ul>
Organizations	Focus groups, group meetings, observations, video/photo, archival materials (print/digital historical records such as library collections, annual reports, websites, media/news coverage)	
Culture	Interviews, observations, text (fiction/nonfiction), video/photo, archival materials (print/digital historical records such as library collections, annual reports, websites, media/news coverage)	

# QUALITATIVE DATA SOURCES

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- 3 Types of Data Sources
- Phenomenon of Interest & Data Sources



# Three Types of Data Sources (Unit of Analysis)

1. People\*
  - Individuals
  - Dyads
  - Groups
2. Organizations\*
  - Departments
  - Divisions
  - Geographic Locations
3. Culture
  - Symbols
  - Language
  - Norms and Values
  - Artifacts

*\*Note.* When designing case studies, it is important to consider the types/levels of people and organizations (units of analysis) that impact critical decisions about single vs. multi-case and holistic vs. embedded designs.

# Phenomenon of Interest & Data Sources

Phenomenon	Data Source (Unit of Analysis)
Individual change	Person
Individual abilities	Person
Interpersonal relationships	Dyads
Group development	Group
Coalitions	Group
Coalition membership	Person
Organizational culture	Organization
Cultural differences	Culture

*Note.* Table adapted from Boyatzis, 1998, p. 66.



# QUALITATIVE DATA COLLECTION METHODS

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- Unit of Analysis vs. Unit of Coding
- Phenomenon of Interest, Unit of Analysis, & Unit of Coding
- Unit of Analysis, Unit of Coding, & Data Collection Methods



# Unit of Analysis vs. Unit of Coding

## Unit of Analysis

“The unit of analysis is the entity on which the interpretation of the study will focus” (Boyatzis, 1998, p. 62).

## Unit of Coding

“The unit of coding is the most basic segment, or element, of the raw data or information that can be assessed in a meaningful way regarding the phenomenon. The unit of coding can never be an entity larger than the unit of analysis” (Boyatzis, 1998, p. 63).

# Phenomena of Interest, Unit of Analysis, and Unit of Coding

Phenomenon	Unit of Analysis	Unit of Coding
Individual change	Person	Sample of behavior
	Person	Description of reaction to event
Individual abilities	Person	Critical incident
Interpersonal relationships	Dyads	An exchange of actions/interactions
Group development	Group	Early, middle, and late samples of group's functioning
Coalitions	Group	Interactions
Coalition membership	Person	Each person's interactions with others
Organizational culture	Organization	Observed events (e.g., staff meetings)
Cultural differences	Culture	Myths or folktales

*Note.* Table adapted from Boyatzis, 1998, p. 66.

# Unit of Analysis, Unit of Coding, and Data Collection Methods

Unit of Analysis (Phenom.)	Unit of Coding	Collection Methods (Related analysis techniques)
Person (individual change)	Sample of behavior	<ul style="list-style-type: none"> <li>• Direct observation (QUAL/QUAN content analysis)</li> <li>• Video/photo (QUAL/QUAN content analysis)</li> </ul>
Person (individual change)	Description of reaction to an event	<ul style="list-style-type: none"> <li>• Interview (thematic analysis)</li> <li>• Letter/blog/diary/journal/essay/memoir/biography (QUAL/QUAN content analysis)</li> </ul>
Person (individual abilities)	Critical incident	<ul style="list-style-type: none"> <li>• Direct observation</li> <li>• Video/photo</li> <li>• Interview</li> <li>• Letter/blog/diary/journal/essay/memoir/biography</li> </ul>

*\*Note.* Not necessarily a dramatic event, a critical incident is one that has significance for the person, one that makes the person stop and think about aspects of personal beliefs, values, attitudes, and/or behavior. Table adapted from Boyatzis, 1998, p. 66.

# Unit of Analysis, Unit of Coding, and Data Collection Methods (cont.)

Unit of Analysis (Phenom.)	Unit of Coding	Collection Methods (Analysis techniques)
Dyad (interpersonal relationships)	An exchange of actions/interactions	<ul style="list-style-type: none"> <li>• Direct observation (QUAL/QUAN content analysis)</li> <li>• Video/photo (QUAL/QUAN content analysis)</li> <li>• Interview (thematic analysis)</li> <li>• Letter/blog/diary/journal/ essay/memoir/ biography (QUAL/QUAN content analysis)</li> </ul>
Group (group development)	Early, middle, and late samples of group's functioning	<ul style="list-style-type: none"> <li>• Direct observation</li> <li>• Video/photo</li> <li>• Focus group (thematic analysis)</li> <li>• Interview</li> <li>• Letter/blog/diary/journal/ essay/memoir/ biography</li> </ul>

# Unit of Analysis, Unit of Coding, and Data Collection Methods (cont.)

Unit of Analysis (Phenom.)	Unit of Coding	Collection Methods (Analysis techniques)
Group (coalitions)	Interactions	<ul style="list-style-type: none"> <li>• Direct observation (QUAL/QUAN content analysis)</li> <li>• Video/photo (QUAL/QUAN content analysis)</li> <li>• Interview (thematic analysis)</li> <li>• Focus group (thematic analysis)</li> <li>• Letter/blog/diary/journal/ essay/memoir/ biography (QUAL/QUAN content analysis)</li> </ul>
Person (coalition membership)	Each person's interactions with others	<ul style="list-style-type: none"> <li>• Direct observation</li> <li>• Video/photo</li> <li>• Interview</li> <li>• Letter/blog/diary/journal/essay/memoir/ biography</li> </ul>

# Unit of Analysis, Unit of Coding, and Data Collection Methods (cont.)

Unit of Analysis (Phenom.)	Unit of Coding	Collection Methods (Analysis techniques)
Organization	Observed events (e.g., staff meetings)	<ul style="list-style-type: none"> <li>• Direct observation (QUAL/QUAN content analysis)</li> <li>• Video/photo (QUAL/QUAN content analysis)</li> <li>• Interview (thematic analysis)</li> <li>• Letter/blog/diary/journal/ essay/memoir/ biography (QUAL/QUAN content analysis)</li> </ul>
Culture	Myths or folktales	Select works of fiction that evidence particular aspects of a culture (QUAL/QUAN content analysis)

# QUALITATIVE RESEARCH DESIGN EXAMPLES

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*Southern California Small Business Leaders and Emotional Intelligence: Exploring Perceptions of Effect and Value in the Workplace (Smith, 2015)*





# Mixed Methods Example:

*Southern California Small Business Leaders and Emotional Intelligence: Exploring Perceptions of Effect and Value in the Workplace (Smith, 2015)*

Design Aspect	Smith's (2015) Dissertation
Phenomenon of interest	Individual abilities: emotional intelligence
Research design/genre	Sequential mixed methods (quan. → qual.)
Unit of analysis	Person: small business owner
Unit of coding	Critical incident*: emotional intelligence displayed in the workplace
Data source	One-on-one interviews
Data collection instrument	Semi-structured interview guide
Data analysis methods	Thematic analysis (open coding + axial coding)

\*Note. Not necessarily a dramatic event, a critical incident is one that has significance for the person, one that makes the person stop and think about aspects of personal beliefs, values, attitudes, and/or behavior.

# Single Embedded Case Study Example:

*Perceived Effects of Organizational Support During Mediation of Supervisor-Subordinate Workplace Conflicts: An Embedded Case Study (Faircloth, 2016)*

Design Aspect	Faircloth's (2016) Dissertation
Phenomenon of interest	Interpersonal relationships: Organizational support during mediation
Research design/genre	Single embedded case study
Unit of analysis	Dyad: Supervisor + subordinate
Unit of coding	Critical incident: workplace mediation
Data source	One-on-one interviews
Data collection instrument	Semi-structured interview guide
Data analysis methods	Thematic analysis (open coding + axial coding)

# Critical Discourse Analysis:

*Examining the Leadership Characteristics of Harry Potter and Katniss Everdeen Through the Lens of Transformational Leadership Theory (Underhill, 2018)*

Design Aspect	Underhill's (2018) Dissertation
Phenomenon of inquiry/interest	Individual abilities: TLT leadership characteristics
Research design/genre	Critical discourse analysis with content analysis
Unit of analysis	Fictional persons: Harry Potter & Katniss Everdeen
Unit of coding	Sample of behavior; Critical incident
Data source	Fictional Novels: <i>Harry Potter and the Goblet of Fire</i> and <i>Mockingjay: The Final Book of the Hunger Games</i>
Data collection instrument	Data coding sheet
Data analysis methods	Open-coding

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## About the Author/Presenter

**Debra A. Fisher, Ph.D.** earned her doctorate in education with an emphasis on professional/interdisciplinary studies. In addition to education, her academic background includes English, philosophy, adult learning theory, and emergency management. Dr. Fisher is the founder/owner of CastleBridge Research Consulting, a research education, and communications company. As an independent consultant for more than 16 years, she has advised on 100s of dissertations. She supports academic and business clients by providing qualitative research analysis (ATLAS.ti and MAXQDA), advising/coaching, and developmental editing services. You can learn more about her and the services she provides at [www.CastleBridgeResearch.com](http://www.CastleBridgeResearch.com).

Dr. Fisher is presently training her second Golden Retriever, Caleb, to serve as a therapy dog for children with special needs, including those living with the challenges of cancer, hearing impairments, and learning disabilities.

Should you have questions about today's webinar, you can reach Dr. Fisher at [Debra@CastleBridgeResearch.com](mailto:Debra@CastleBridgeResearch.com).

