Online Support for QDA and CAQDAS and Evaluation of Learning Needs

Introduction

The project will produce a set of online training support resources, partly web based and partly video, which will address common problems with Qualitative Data Analysis (QDA) and selected Computer Assisted Qualitative Data Analysis Software (CAQDAS) packages.

Aims and objectives

1. To survey current CAQDAS users to assess their learning needs
2. To identify the types of researchers using QDA and CAQDAS
3. To establish the key learning help needed by recent learners of CAQDAS programs and researchers new to QDA.
4. To create and evaluate online training support materials for qualitative researchers.
5. To reinforce the skills learned at CAQDAS courses and other similar courses.
6. To provide just-in-time assistance for learners of QDA and the CAQDAS programs
7. To use the CAQDAS networking project as a means of dissemination and delivery of the created online materials.

Online materials

The online materials will be both web pages and digital video, the latter showing a desktop image so users can see how to undertake actions in the software. We wish to address common problems (both early and advanced) of QDA and CAQDAS usage. We expect to do this in generic ways but also with some specific practical advice for software programs. These materials are intended to complement workshops NOT replace them.

Volunteers needed

<table>
<thead>
<tr>
<th>Volunteers needed</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Stage 2 – Interviews</strong></td>
<td>August – November 2004</td>
</tr>
<tr>
<td>We are interested in interviewing UK based trainers about your experience of training people to use computer aided qualitative data analysis software (CAQDAS).</td>
<td></td>
</tr>
<tr>
<td><strong>Stage 3 – Online Questionnaire Survey</strong></td>
<td>November – January 2004</td>
</tr>
<tr>
<td>The survey will be conducted online to reach a broad range of people using QDA and CAQDAS and will help us to identify the topics that need to be included in the learning materials.</td>
<td></td>
</tr>
<tr>
<td><strong>Stage 4 – User trial of a prototype version of the learning materials</strong></td>
<td>February – April 2005</td>
</tr>
<tr>
<td>You will be testing a prototype of the learning materials and giving feedback on the suitability of the delivery style.</td>
<td></td>
</tr>
<tr>
<td><strong>Stage 5 – User trial of the full version of the learning materials</strong></td>
<td>July –September 2005</td>
</tr>
<tr>
<td>You will be testing the full version of the learning materials and giving feedback on the suitability of the topics covered and the delivery style.</td>
<td></td>
</tr>
</tbody>
</table>

If you are interested in taking part in any stage of the project or require further information please contact Celia Taylor: Email: c.p.taylor@hud.ac.uk Tel: +44 (0) 1 484 47 36 11
Research Design

There will be a formative evaluation to establish the detailed learning needs that need to be addressed by the online resources. Individual volunteer participants and those attending CAQDAS Networking Project workshops, will be introduced to the materials. Their usage will be tracked and if they agree will also be interviewed about their use of the materials. We may carry out these interviews by phone or email.

Outputs

- Web and digital video materials to support:
  - basic QDA
  - basic use of popular CAQDAS programs
  - advanced use of selected CAQDAS programs
    (Complemented by a search system and a bookmarking system).
- Online materials will be served from the CAQDAS web site in the first instance but the project will investigate options for their long term siting.
- Report on the learning needs of those new to CAQDAS.
- Conference presentations and academic papers.

Researchers:

Graham R. Gibbs, University of Huddersfield
Professor Nigel Fielding, University of Surrey
Ann Lewins, University of Surrey
Celia Taylor, University of Huddersfield

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http://caqdas.soc.surrey.ac.uk/caqdas/onlineqda/qdahome.htm
Online Support for QDA and CAQDAS: Evaluation of Learning Needs

1. Researchers

Mr Graham R. Gibbs, University of Huddersfield
Professor Nigel Fielding, University of Surrey
Ann Lewins, University of Surrey
Celia Taylor, University of Huddersfield

2. Background

Recent decades have seen a rapid increase in the use of qualitative data analysis (QDA) methods in social science disciplines and latterly in psychology. At the same time there is now a wide range of computer assisted qualitative data analysis software (CAQDAS) available. For many years, the ESRC has supported the CAQDAS Networking Project (CNP) at the Univ. of Surrey which has provided workshops, seminars, a helpline and other support for CAQDAS (such as a JISCMail list with over 930 subscribers). This project has complemented these activities with on-line materials designed to support those learning QDA and CAQDAS.

There is a broad range of texts available on QDA and several of these are now in their second editions (Mason 1996; Silverman 1993; Strauss and Corbin 1990) demonstrating growing demand. However, experience of the helpline at the CNP suggested that there was also a need for focused assistance at the point of need for researchers who are new to QDA and especially for those coming from a quantitative background or from non-academic professions such as medicine. The need is for materials that provide an introduction to QDA approaches in a way that addresses the questions of such inquirers.

There are several books and book chapters on CAQDAS programs and there is a growing interest by both experienced researchers and by new qualitative researchers in their use. Most texts are either generic in approach or, more frequently, cover CAQDAS in outline only, in one chapter. Three volumes (Bazeley and Richards 2000; Gibbs 2002; Richards and Richards 2005) focus on the facilities of one software program, NVivo. Again, experience at the CNP suggested that there was a need for additional, continuing and just-in-time support for those learning to use CAQDAS programs that covered other software and covered some issues in more depth. The CNP already runs follow-up sessions, but demand for these and other subsequent support exceeds the Project’s resources. The helpline is heavily used (as detailed in CAQDAS’ reports to ESRC) and many queries about software use and data analysis methods can occupy up to an hour of helpline time or considerable e-mail writing time. The great majority of practical questions are caused by time gaps between training and usage, or are about the use of a particular part of the software. Common problems experienced are:

- how to safeguard work;
- 'get out of trouble' help (often when the problem of data loss turns out to be merely unfamiliarity with the software or even the operating system);
• 'how to do it' questions where prompts are needed to remind users what to do (this is often done by talking through the process on the phone whilst the user is on their computer;
• the 'where to go next?' question, often where the user has forgotten a whole dimension of work in the software which would allow interesting comparisons to be made across subsets;
• how to create higher concept abstractions;
• how to look for detailed co-occurring themes.
• There are also more general questions regarding software suitability and how to get started with the software (in many cases this is linked to a request for information about courses) and the suitability of software for team working.

Therefore the main aim of this project was to create and evaluate online training support materials for qualitative researchers and to integrate these with other aspects of the CNP, such as the inquiry/help desk, the JISCMail list (Qual-Software) and the training workshops.

3. Objectives
To establish the key learning help needed by recent learners of CAQDAS programs and researchers new to QDA.
To this end we carried out a needs assessment based on a number of depth interviews, some verbal protocol interviews while respondents used the software and an online survey. In addition we undertook a content analysis of the last 2 years of postings to four active CAQDAS related list servers. (Details below.) These filled out the picture of training needs summarised above and defined the major contents and design of the online materials. After a pilot web site had been created, information about needs (along with feedback about the sited design) was obtained from a large number of volunteer evaluators. (Details below.)

4. Methods

Needs assessment
The first stage of the project was a needs assessment. Data for this came predominantly from these sources.

a. Observation of volunteers using CAQDAS software. There were 10 sessions and all took place at the CNP at the U. Surrey and were carried out by Ann Lewins. All volunteers were attending the CNP for CAQDAS training and were asked to talk aloud about their thinking as they used (or sometimes misused) the software (Ericsson and Simon 1984; Preece 1994). The idea of this approach was to reveal misunderstandings about the software, points of difficulty or struggle in the use of the software, and to resolve the difficulties during the session.

b. Interviews with 24 software users and trainers. This was a UK sample and respondents were interviewed by Celia Taylor at Huddersfield or on the telephone from
Huddersfield, or by Ann Lewins from Surrey. The sample was designed to include a range of the different kinds of users (with differing levels of experience and expertise, and with different roles – PhD student, software trainer, researcher etc.) See Table 1 and Table 2.

Table 1. Types of respondents taking part in the interviews and help/observation sessions

<table>
<thead>
<tr>
<th>Type of respondent</th>
<th>Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Researcher</td>
<td>11</td>
</tr>
<tr>
<td>Software trainer</td>
<td>3</td>
</tr>
<tr>
<td>PhD student</td>
<td>9</td>
</tr>
<tr>
<td>Professor</td>
<td>1</td>
</tr>
<tr>
<td>Lecturer</td>
<td>5</td>
</tr>
<tr>
<td>Qualitative IT managers</td>
<td>2</td>
</tr>
<tr>
<td>Qualitative resource manager / s/w trainer</td>
<td>2</td>
</tr>
<tr>
<td>Masters student</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>34</td>
</tr>
</tbody>
</table>

Table 2. Discipline of respondents

<table>
<thead>
<tr>
<th>Discipline</th>
<th>Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nursing</td>
<td>1</td>
</tr>
<tr>
<td>Psychology</td>
<td>4</td>
</tr>
<tr>
<td>Education</td>
<td>4</td>
</tr>
<tr>
<td>Sports science</td>
<td>1</td>
</tr>
<tr>
<td>Govt Audit research</td>
<td>1</td>
</tr>
<tr>
<td>Pharmacy</td>
<td>1</td>
</tr>
<tr>
<td>Health</td>
<td>2</td>
</tr>
<tr>
<td>Public health</td>
<td>1</td>
</tr>
<tr>
<td>Men's Health</td>
<td>1</td>
</tr>
<tr>
<td>Sociology</td>
<td>3</td>
</tr>
<tr>
<td>Historic Anthropology</td>
<td>1</td>
</tr>
<tr>
<td>Built Environment</td>
<td>1</td>
</tr>
<tr>
<td>Psychiatry</td>
<td>2</td>
</tr>
<tr>
<td>Management</td>
<td>3</td>
</tr>
<tr>
<td>Qual. resource</td>
<td>1</td>
</tr>
<tr>
<td>Trainer-Consultant</td>
<td>1</td>
</tr>
</tbody>
</table>

c. Online questionnaire survey. This survey attempted to complement information from interviews and observations, but contacted a much wider range of researchers, including many outside the UK. It developed a questionnaire used by Nigel Fielding in an earlier survey of qualitative researchers. This was extended to ask respondents about their current position, their job, their discipline and their level and experience of training in QDA and CAQDAS. Respondents were then asked about their current project and their use of CAQDAS and then a range of questions about what training priorities they had. The questionnaire was made available on the web and respondents were encouraged to complete it through messages to a large number of forums and lists. We ensured that we contacted not just lists that were about CAQDAS, but any that we knew might
include members doing qualitative research. However, there was clearly a bias in
respondents towards those comfortable with completing an online questionnaire. It is in
the nature of online surveys that one cannot know how representative the sample is. For
example, our survey was in English, and although we contacted some non-English lists,
all our respondents had to speak English. It is impossible to say what impact, if any, that
might have had on the generalisability of our results about training and use of QDA and
CAQDAS.

5. Results

User needs evaluation interviews
Our user needs evaluation was performed on a wide cross section of experience levels,
roles and across traditional social science disciplines in the usage of CAQDAS and QDA
but also included newer areas of use in History and the Built Environment. It has
highlighted several general issues of relevance to the training of researchers in qualitative
methods. As well as identifying particular issues of learning and support that the web site
needed to address, we noticed that respondents talked generally about the place of
software in their own and their peers’ work and other themes emerged in terms of how
they talked of and performed qualitative research. Some of the themes were personally
oriented, others by necessity were about practical issues to do with day to day work with
software. Here we summarize these issues, focussing on the most important topics in
terms of influences on how the online resource was constructed; these were teaching and
learning issues, analysis, the effect of software on method, practical difficulties and
insecurities.

Software’s influence on method
There has been much debate about the extent to which CAQDAS might affect the
procedures of QDA (Coffey et al. 1996; Fielding and Lee 1991; Kelle 1995; Kelle 1997;
MacMillan and Koenig 2004; Richards and Richards 1994). One example of this in our
data was the observation expressed by several respondents that once comfortable with
using the software users tended to make do with familiar processes – without stretching
themselves or using more complex or lengthy procedures. On the other hand some
respondents were cautious about the persuasive ease of some software functions. One
example of this, especially in applied research was the occasional reliance on software
autocoding over more careful analytical and coding work. At the opposite end of the
spectrum was the view from an NVivo user and lecturer resisting the forceful statements
by software developers about the transformation in method the use of CAQDAS might
bring.

Teaching and support for QDA and CAQDAS
We found much variability in local support and investment in QDA and CAQDAS
training. Most respondents felt well supported for the theoretical aspects of their chosen
methods, but postgraduate students and novice researchers often felt the lack of general
support in their institutions. There was thus often a failure to sustain learning and
familiarization momentum after initial training. Two particular aspects of this were a lack
of detailed methods support for those working outside the main social science areas (i.e.
areas not supported directly by the ESRC) and especially a lack of support in many
institutions for those using and learning to use computers in qualitative analysis. Some
respondents noted how in their view, QDA teaching was complicated by the need to
look at CAQDAS too. Several of those who were trainers or teachers noted the need for ‘joined-up’ methods of teaching to avoid the perception amongst undergraduate students that qualitative research and even software use were ‘easy options’. A related issue mentioned by several users was getting access to training at the right time and right level for their current practical needs.

Limited perceptions of software and qualitative data analysis
Commonly where this was identified, there was a lack of understanding of what QDA was or what assistance CAQDAS would be. Often this was more to do with a misunderstanding of the relationship between software and QDA with users hoping for a magic outcome where the software did the analysis for you.

Self reliance
Several users liked to work things out on their own – however at least two self taught researchers seemed to have problems perceiving the larger picture of what the software could and couldn’t do, or had limited or unrealistic perceptions of its usefulness. As in the previous point, this was partly because they found it easy to learn the software, but did not have a good grasp of what QDA involved.

Changing expectations and attitudes to software
Several respondents said they now recognised the necessity of CAQDAS teaching but availability of such software tools, they felt, sends wrong messages to inexperienced QDA students etc. In particular the message that software will assist with analytic thinking. As a result they thought the availability of software has complicated qualitative methods teaching.

Difficulties in use of software
There were recurring themes amongst those developing their skills in qualitative analysis. This was usually expressed as areas or topics they found it a struggle to learn or to develop. Most prevalent were problems with searching, muddles about where coding was happening in complex hierarchies, and feeling there were too many ways to do one thing in the software.
Other common problems included, coding text and organising code books, awareness of the different types of qualitative analysis (including mixed methods), the phase of analysis that moves from coding and notes to a full, theoretical narrative or write up, and bringing different aspects together in a project e.g. socio demographic variables and conceptual coding.
Many researchers reported difficulties in seeing how analytic approaches could be applied in practice in real data sets. This is the stage of analytic activity that is seldom reported in published research papers. Linked to this was a real problem that many experienced in knowing how to implement such analytic activities in their software packages. Many suggested they would like worked examples both of analytic procedures and of software use.

Fears - insecurities
These were different from difficulties, and much more related to uncertainty about quality of their analytic work and twofold anxieties about how muddled or inefficient use of the software caused wrong turns in their thinking. Another common anxiety revolved around security issues about saving and moving projects.
Software choice and purchase

An issue that came up many times, especially on the forums, was the choice of software and compatibility of software with the particular methodological approach researchers were adopting. Another issue was the need both to fund and schedule appropriate training and to find out what training was available. The CNP was well known in the UK in the core social science areas, but less well known amongst those using these analytic approaches in related disciplines (e.g. medicine, nursing, planning, technology).

Online survey

In all, 251 people responded to the online survey. Over three quarters of respondents worked in universities with 44% from the UK and over a quarter from the USA. See Table 3 and Table 4.

Table 3. Organisation where survey respondents worked

<table>
<thead>
<tr>
<th>Organisation</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central/Federal Government</td>
<td>1.6</td>
</tr>
<tr>
<td>Local/Regional/State Government</td>
<td>2.0</td>
</tr>
<tr>
<td>Research Company</td>
<td>4.8</td>
</tr>
<tr>
<td>Charity/voluntary sector</td>
<td>3.2</td>
</tr>
<tr>
<td>University</td>
<td>76.9</td>
</tr>
<tr>
<td>Health Service/Hospital</td>
<td>4.4</td>
</tr>
<tr>
<td>Other</td>
<td>5.6</td>
</tr>
</tbody>
</table>

Table 4. Where survey respondents worked

<table>
<thead>
<tr>
<th>Region</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>44.3</td>
</tr>
<tr>
<td>EU</td>
<td>15.7</td>
</tr>
<tr>
<td>Elsewhere in Europe</td>
<td>2.9</td>
</tr>
<tr>
<td>USA or Canada</td>
<td>27.1</td>
</tr>
<tr>
<td>Central or South America</td>
<td>1.4</td>
</tr>
<tr>
<td>Australia, New Zealand or Oceania</td>
<td>4.3</td>
</tr>
<tr>
<td>Asia</td>
<td>4.3</td>
</tr>
</tbody>
</table>

The largest group of respondents was funded PhD students, but there were also a number of academics and experienced QDA researchers. See Table 5.
Table 5. Role, occupation etc of survey respondents.

<table>
<thead>
<tr>
<th>Role</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>0.8</td>
</tr>
<tr>
<td>Masters student</td>
<td>4.0</td>
</tr>
<tr>
<td>PhD student</td>
<td>32.3</td>
</tr>
<tr>
<td>Lecturer/professor</td>
<td>19.5</td>
</tr>
<tr>
<td>Research assistant</td>
<td>3.6</td>
</tr>
<tr>
<td>Research officer</td>
<td>19.5</td>
</tr>
<tr>
<td>Research Director</td>
<td>3.6</td>
</tr>
<tr>
<td>Other</td>
<td>14.7</td>
</tr>
</tbody>
</table>

The most frequently used analytic approaches were, grounded theory (over half of the respondents used this approach), ethnography, action research, narrative, action research and discourse analysis. See Table 6. However, many respondents used more than one analytic approach. It has been argued that CAQDAS programs are biased in features and tools towards grounded theory (MacMillan and Koenig 2004). Although there are some doubts about the representativeness of this sample, the distribution we have found can be interpreted in two ways. Either, the software is right to reflect grounded theory as this is by far the most common qualitative analysis approach, or a consequence of the bias in the software is that grounded theory is the most common approach. We tend towards the former interpretation, as it seems unlikely that CAQDAS has had that much influence.

Table 6. Analytic methods used by respondents.

<table>
<thead>
<tr>
<th>Method</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grounded Theory</td>
<td>53.8</td>
</tr>
<tr>
<td>Ethnography</td>
<td>28.0</td>
</tr>
<tr>
<td>Action Research</td>
<td>23.3</td>
</tr>
<tr>
<td>Narrative analysis</td>
<td>22.0</td>
</tr>
<tr>
<td>Discourse Analysis</td>
<td>20.8</td>
</tr>
<tr>
<td>Constructivism</td>
<td>15.7</td>
</tr>
<tr>
<td>Conversation analysis</td>
<td>12.7</td>
</tr>
<tr>
<td>Life history/Biography</td>
<td>12.7</td>
</tr>
<tr>
<td>Symbolic Interactionism</td>
<td>9.3</td>
</tr>
<tr>
<td>Phenomenology</td>
<td>8.9</td>
</tr>
<tr>
<td>Interpretive Phenomenological Analysis</td>
<td>8.5</td>
</tr>
<tr>
<td>Framework method</td>
<td>6.8</td>
</tr>
<tr>
<td>Hermeneutics</td>
<td>6.4</td>
</tr>
<tr>
<td>Frame Analysis</td>
<td>5.1</td>
</tr>
<tr>
<td>Ethnomethodology</td>
<td>4.7</td>
</tr>
<tr>
<td>Template analysis</td>
<td>2.5</td>
</tr>
<tr>
<td>Mixed methods</td>
<td>2.5</td>
</tr>
<tr>
<td>Genre analysis</td>
<td>1.7</td>
</tr>
<tr>
<td>Life-world analysis</td>
<td>1.3</td>
</tr>
<tr>
<td>Memory work</td>
<td>1.3</td>
</tr>
<tr>
<td>Objective hermeneutics</td>
<td>1.3</td>
</tr>
<tr>
<td>Focus groups</td>
<td>1.3</td>
</tr>
<tr>
<td>Others</td>
<td>16.9</td>
</tr>
</tbody>
</table>
Qualitative analysts who replied came predominantly from a small number of disciplines; education, psychology, sociology and anthropology. See Table 7. This shows the not unexpected limited popularity of QDA in some discipline, but, of course, it also may reflect simply the smaller number of researchers in some disciplines. We have no base figures for the number of researchers using any methodology in each discipline across the world to compare with our figures.

**Table 7. Main disciplinary identification of respondents**

<table>
<thead>
<tr>
<th>Discipline</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>20.3</td>
</tr>
<tr>
<td>Psychology</td>
<td>12.7</td>
</tr>
<tr>
<td>Sociology</td>
<td>11.9</td>
</tr>
<tr>
<td>Anthropology</td>
<td>8.5</td>
</tr>
<tr>
<td>Health</td>
<td>6.4</td>
</tr>
<tr>
<td>Social Policy</td>
<td>4.7</td>
</tr>
<tr>
<td>Management</td>
<td>3.4</td>
</tr>
<tr>
<td>Geography</td>
<td>2.1</td>
</tr>
<tr>
<td>Nursing</td>
<td>2.1</td>
</tr>
<tr>
<td>Politics</td>
<td>2.1</td>
</tr>
<tr>
<td>Social Work</td>
<td>2.1</td>
</tr>
<tr>
<td>Medicine</td>
<td>1.7</td>
</tr>
<tr>
<td>Economics</td>
<td>1.3</td>
</tr>
<tr>
<td>Marketing</td>
<td>1.3</td>
</tr>
<tr>
<td>Business</td>
<td>0.8</td>
</tr>
<tr>
<td>Criminology</td>
<td>0.8</td>
</tr>
<tr>
<td>History</td>
<td>0.8</td>
</tr>
<tr>
<td>Architecture</td>
<td>0.4</td>
</tr>
<tr>
<td>Physical Education</td>
<td>0.4</td>
</tr>
<tr>
<td>Social Administration</td>
<td>0.4</td>
</tr>
<tr>
<td>Other</td>
<td>15.7</td>
</tr>
</tbody>
</table>

Table 8 shows the distribution of respondents across methods for the four most common discipline identifications. The popularity of grounded theory was preserved in most disciplines except, unsurprisingly in anthropology. Ethnography was popular in anthropology and also in education, as is action research. Overall the picture is one where a few methods predominate in most disciplines, but at the same time there is a wide variety of approaches adopted by some researchers, with no discipline showing any exclusive methods.
Table 8. Numbers of respondents using the most popular methods, by discipline.

<table>
<thead>
<tr>
<th>Method</th>
<th>Principal Discipline</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Anthropology</td>
</tr>
<tr>
<td>Grounded Theory</td>
<td>10</td>
</tr>
<tr>
<td>Ethnography</td>
<td>17</td>
</tr>
<tr>
<td>Action Research</td>
<td>1</td>
</tr>
<tr>
<td>Narrative analysis</td>
<td>5</td>
</tr>
<tr>
<td>Discourse Analysis</td>
<td>7</td>
</tr>
<tr>
<td>Constructivism</td>
<td>2</td>
</tr>
<tr>
<td>Conversation analysis</td>
<td>6</td>
</tr>
<tr>
<td>Life history/Biography</td>
<td>6</td>
</tr>
<tr>
<td>Symbolic Interactionism</td>
<td>2</td>
</tr>
<tr>
<td>Phenomenology</td>
<td>3</td>
</tr>
<tr>
<td>Interpretive Phenomenological Analysis</td>
<td>3</td>
</tr>
<tr>
<td>Framework method</td>
<td>1</td>
</tr>
<tr>
<td>Hermeneutics</td>
<td>3</td>
</tr>
<tr>
<td>Frame Analysis</td>
<td>1</td>
</tr>
<tr>
<td>Ethnomethodology</td>
<td>2</td>
</tr>
<tr>
<td>Others</td>
<td>3</td>
</tr>
</tbody>
</table>

Most of the sample had received some training in QDA, though over a quarter were self taught. See Table 9. 70% of the postgraduate student respondents had received training in QDA during the course of their PhD.

Table 9. Where respondents had received training in qualitative data analysis (respondents could answer more than one).

<table>
<thead>
<tr>
<th>Received formal training as part of their undergraduate degree</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Received formal training as part of their postgraduate taught course</td>
<td>23.9</td>
</tr>
<tr>
<td>Used qualitative methods in their master's dissertation</td>
<td>29.1</td>
</tr>
<tr>
<td>Received formal training during the course of their PhD</td>
<td>40.6</td>
</tr>
<tr>
<td>Had in-house (non-university) training</td>
<td>21.1</td>
</tr>
<tr>
<td>None; self-taught in qualitative data analysis</td>
<td>26.7</td>
</tr>
</tbody>
</table>

Nearly three quarters of the respondents had, at some time, analysed qualitative data without using CAQDAS. The reasons for not using CAQDAS are shown in Table 10. The most common reason was lack of access to software though it should be borne in mind that in some cases this was before software was available. Interestingly, only 5.6% said it was because the software did not support the methodologies/theoretical approach they had used.
Table 10. Reason for not using CAQDAS (respondents could answer more than one)

<table>
<thead>
<tr>
<th>Reason</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>No access to software</td>
<td>41.1</td>
</tr>
<tr>
<td>Data set too small</td>
<td>27.1</td>
</tr>
<tr>
<td>Would take too long to learn</td>
<td>21.1</td>
</tr>
<tr>
<td>No access to training</td>
<td>19.1</td>
</tr>
<tr>
<td>No local support for software use</td>
<td>16.7</td>
</tr>
<tr>
<td>No time to use software</td>
<td>14.7</td>
</tr>
<tr>
<td>Was not aware such software existed</td>
<td>13.9</td>
</tr>
<tr>
<td>Cost of training was too much</td>
<td>11.6</td>
</tr>
<tr>
<td>Using software would keep researcher too distant from their data</td>
<td>6.0</td>
</tr>
<tr>
<td>Software did not support methodologies/theoretical approach used</td>
<td>5.6</td>
</tr>
<tr>
<td>Waiting to do a training workshop before using the software</td>
<td>5.6</td>
</tr>
<tr>
<td>Was advised not to use software,</td>
<td>2.8</td>
</tr>
<tr>
<td>Other</td>
<td>12.0</td>
</tr>
</tbody>
</table>

Around 18% of the sample had never used CAQDAS. Of those who had, the principal software they used is shown in Table 11. Three programs dominated; NVivo, ATLAS.ti and Nud.ist with MAXqda and HyperRESEARCH taking fourth and fifth places some way behind.

Table 11. Principal software used

<table>
<thead>
<tr>
<th>Software</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>QSR NVivo</td>
<td>25.5</td>
</tr>
<tr>
<td>ATLAS.ti</td>
<td>23.5</td>
</tr>
<tr>
<td>Nud.ist N4/N5/N6</td>
<td>15.1</td>
</tr>
<tr>
<td>MAXqda</td>
<td>4.4</td>
</tr>
<tr>
<td>Hyper RESEARCH</td>
<td>2.0</td>
</tr>
<tr>
<td>Qualrus</td>
<td>1.6</td>
</tr>
<tr>
<td>winMAX</td>
<td>1.6</td>
</tr>
<tr>
<td>AQUAD</td>
<td>0.8</td>
</tr>
<tr>
<td>Alceste</td>
<td>0.4</td>
</tr>
<tr>
<td>CDC E/Z-text</td>
<td>0.4</td>
</tr>
<tr>
<td>QDA Miner</td>
<td>0.4</td>
</tr>
<tr>
<td>Qualifiers</td>
<td>0.4</td>
</tr>
<tr>
<td>The Ethnograph</td>
<td>0.4</td>
</tr>
<tr>
<td>Transana</td>
<td>0.4</td>
</tr>
<tr>
<td>MS Word or other WP</td>
<td>0.4</td>
</tr>
<tr>
<td>WordStat</td>
<td>0.4</td>
</tr>
<tr>
<td>Other</td>
<td>4.0</td>
</tr>
<tr>
<td>Total who have used s/w</td>
<td>81.7</td>
</tr>
<tr>
<td>Never used</td>
<td>18.3</td>
</tr>
<tr>
<td>Total</td>
<td>100.0</td>
</tr>
</tbody>
</table>
10. Ethics
There are no special ethical issues arising from the data collected for this project. Respondents have either been anonymous (as in the case of the online survey) or have been assured of anonymity and given fully informed consent (as in the case of interviewees and users observed). We have and intend to preserve the anonymity of our respondents in our reports and publications.

11. Bibliography
RES-333-25-0009 – Online Support for QDA and CAQDAS and Evaluation of Learning Needs

A team at the Universities of Huddersfield and Surrey have examined the needs of researchers learning qualitative data analysis (QDA) and computer assisted qualitative data analysis (CAQDAS), and used the findings to develop an online resource to help with training.

Key Findings

Software influence?

- Some researchers kept to the familiar procedures supported by the software. A few relied too much on automatic functions rather than reading and analytic thinking. Others were cautious about some functions - and the strong views of software developers about its influence on QDA.

- Whilst recognising the need for CAQDAS teaching, some felt that availability of software sent the wrong message to inexperienced researchers - such as the idea that it would do the analytic thinking for them. Even some in this study misunderstood the relationship between software and QDA.

Levels of support

- Most felt well supported in the theoretical aspects of their work, but less so with local support for CAQDAS.

- Often, after initial training, the momentum was not sustained. And there was sometimes a lack of detailed help where, for example, people were not supported directly by the ESRC.

- Several users liked to work things out on their own and were confident users of CAQDAS. However, some self-taught researchers seemed to have problems perceiving the larger picture of what the software could and could not do, or had limited or unrealistic perceptions about it.

Problems and concerns

- The biggest problems were with search facilities. Users were also confused about coding hierarchies, organising code books, awareness of different types of qualitative analysis, the phase of analysis that moves from coding and notes to a full, theoretical narrative or write up, and bringing different aspects together in a project.
Many expressed anxieties about using CAQDAS. These were much more related to uncertainty about quality of work and concerns about how poor use of software caused wrong turns in thinking.

Most had received some training in QDA, though more than a quarter were self-taught. Seventy per cent of postgraduates had received some QDA training.

About the website

- The website developed in this study is [http://onlineqda.hud.ac.uk](http://onlineqda.hud.ac.uk)
- It is tailored to different levels of users, such as those new to QDA, and especially to the use of CAQDAS software; those thinking of using CAQDAS software who may be familiar with QDA; experienced researchers just starting with CAQDAS software; and experienced CAQDAS users who have had problems with it.
- Material addressing the basic learning needs for a range of programs is arranged under themes, such as coding, recoding, searching, reporting, setting up projects and sending memos.

About the Study

The collaborative project (Huddersfield & Surrey CAQDAS Networking) was led by Graham Gibbs, of the Department of Behavioural Sciences, University of Huddersfield. It included interviews and observations with 34 researchers using the software, and an online survey to which 251 researchers replied. Three-quarters of replies came from universities. Nearly 45 per cent were from the UK and just over a quarter from North America.

Key Words

Qualitative data analysis, computers, training, learning, research
Questionnaire on learning needs in qualitative analysis and computer assisted qualitative data analysis.

This questionnaire forms part of the investigation by academics from the University of Huddersfield and University of Surrey, UK, to determine what issues surround learning about Qualitative Data Analysis (QDA) and about the software to support it, Computer Assisted Qualitative Data Analysis Software (CAQDAS).

The project we are engaged in, which is funded by the UK Economic and Social Research Council will eventually produce a set of resources, partly web based and partly video, which will help researchers learn the basics of QDA and selected CAQDAS packages.

The information you provide will be used to help us build online materials which address real issues of analysis. We wish to address common problems (both early and advanced) of qualitative data analysis and computer usage. We expect to do this in generic ways but also with some practical advice for specific programs. These materials are intended to complement hands-on workshops NOT replace them.

Section 1 – About your project

In questions 1 to 6 please answer in terms of your current project or your principal project if you are engaged in more than one

1. What role most closely fits your current position? (Please select one)
   - Undergraduate
   - Masters student
   - PhD student
   - Lecturer/Professor
   - Research assistant
   - Research officer
   - Research director
   - Other (please state)

2. Which of the following best describes the kind of organisation within which your project is based?
   - Central/Federal Government
   - Local/Regional/State Government
   - Research Company
   - Charity/Voluntary sector
   - University
   - Health service/Hospital
3. Who funds the project?

Central/Federal Government ☐
Local/Regional/State Government ☐
UK Research council ☐
EU ☐
Charity/Voluntary sector ☐
University funded ☐
Health service/Hospital ☐
Private sector ☐
Other (please state) ☐

4. Which of the following methodologies/theoretical approaches are you using?
(Please tick as many as are relevant to your current project or your principal project if you are engaged in more than one)

Action Research ☐ IPA ☐
Conversation analysis ☐ Life History/Biography ☐
Constructivism ☐ Life-World Analysis ☐
Discourse analysis ☐ Memory work ☐
Ethnography ☐ Narrative analysis ☐
Ethno methodology ☐ Phenomenology ☐
Frame analysis ☐ Objective hermeneutics ☐
Framework method ☐ Symbolic interactionism ☐
Genre analysis ☐ Template analysis ☐
Grounded theory ☐ Other (please state) ☐
Hermeneutics ☐

5. On this project are you working on your own or as part of a team?

On my own ☐ As part of a team ☐
6. How long is this project scheduled to last from beginning to end?

1 to 3 months ☐
4 to 6 months ☐
7 months to 1 year ☐
13 months to 2 years ☐
Over 2 years but less than 3 years ☐
Over 3 years but less than 4 years ☐
Over 4 years but less than 5 years ☐
5 years or more ☐

Section 2 – About you

7. Which of the following best describes your current principal discipline? (Please select ONE)

Accounting ☐
Anthropology ☐
Architecture ☐
Archaeology ☐
Business ☐
Criminology ☐
Cultural Studies ☐
Economics ☐
Education ☐
Food Science ☐
Geography ☐
Health ☐
History ☐
Journalism ☐
Law ☐
Marketing ☐
Management ☐
Medicine ☐
Nursing ☐
Pharmacology ☐
Physical Education ☐
Politics ☐
Psychology ☐
Social Administration ☐
Social Policy ☐
Social Work ☐
Sociology ☐
Other ☐

8. What formal training have you received in qualitative data analysis (QDA)? (Please tick as many boxes as are relevant to you.)

I received formal training as part of my undergraduate degree ☐
I used qualitative methods in my undergraduate dissertation/extended paper ☐
I received formal training as part of my postgraduate taught course ☐
I used qualitative methods in my master’s dissertation ☐
I received formal training during the course of my PhD ☐
In-house, non-university training ☐
None, I am self-taught in qualitative data analysis ☐
Other (please state)
9. Please tell us what you found the most difficult about doing qualitative data analysis as you were learning?

10. How easy or difficult do you now find the following aspects of qualitative data analysis?

- Data preparation/transcription: V. easy 1 □ 2 □ 3 □ 4 □ 5 □ V. difficult
- Sorting data: V. easy 1 □ 2 □ 3 □ 4 □ 5 □ V. difficult
- Coding data: V. easy 1 □ 2 □ 3 □ 4 □ 5 □ V. difficult
- Finding patterns in the data: V. easy 1 □ 2 □ 3 □ 4 □ 5 □ V. difficult
- Finding relationships in the data: V. easy 1 □ 2 □ 3 □ 4 □ 5 □ V. difficult
- Keeping on top of all the data: V. easy 1 □ 2 □ 3 □ 4 □ 5 □ V. difficult
- Linking findings with theory: V. easy 1 □ 2 □ 3 □ 4 □ 5 □ V. difficult
- Writing the final reports/dissertation/thesis: V. easy 1 □ 2 □ 3 □ 4 □ 5 □ V. difficult

11. Have you ever used a software package to analyse qualitative data?

- No □ Please go to question 12
- Yes □ Please go to question 13

12. What were your main reasons for deciding not to use a software package to analyse your qualitative data? (Please tick as many boxes as are relevant to you.)

- Would take too long to learn □
- No access to software □
- Cost of training was too much □
- No access to training □
- No local support for software use □
- I was advised not to use such software □ (Please state by whom □)
- Software did not support methodologies/theoretical approach I use/used □
- Using software would keep me too distant from my data □
- I am waiting to do a training workshop before I use the software □
- Was not aware such software existed □
Please now go to Section 4, Question 25.

Section 3 – About your use of the software

In this section please answer in terms of the most recent project in which you used a software package to assist with data analysis.

13. At what point in the project was it decided to use a software package? (Please select ONE)

- Proposal
- Start of project
- During data collection
- Just before starting analysis
- During data analysis
- Don’t know

14. Which software packages have you used for qualitative data in this project? (Please tick as many boxes as are relevant to you)

- Alceste
- Annotape
- AnSWR
- AQUAD
- Atlas.ti
- BEST
- CDC EZ-Text
- C-I-SAID
- CQDA 3
- Coder
- Concordance
- Ethno 2
- HyperQual3
- Hyper RESEARCH
- Interclipper
- KIT
- KWALITAN
- MAXqda
- QCA
- QDA Miner
- NUD*IST (N4/N5/N6)
- QSR NVivo
- Qualifiers
- Qualitative Media Analyser
- Qualrus
- TAMS Analyser
- TATOE
- TextBase Gamma
- The Ethnograph
- The Observer
- Transana
- Transcriber/PC & Mac
- winMAX
- Microsoft Word/other word processor (excluding use for transcription)
- WordStat
15. How long have you been using this software package (in whatever version) in total? (Please select)

- Less than 6 months
- 6 months to 11 months
- 1 year to 2 years
- Over 2 yrs. & less than 3 yrs.
- 3 years or more

16. How long, approximately, did you have to use the software package REGULARLY until you felt you were using it effectively? (Please select)

- 1 day
- 1 week
- 1 month
- 6 months
- 1 year
- Over 1 year

17. Everyone can do with help when learning new software. Please tell us what you found frustrating when learning the software. (Please tick as many boxes as are relevant to you)

- Not having enough training in QDA
- Not having enough CAQDAS Training
- Not having enough local support or expertise
- Awkward or infrequent access to the software
- Other (please state)

18. How well did the software package support your methodology/theoretical approach in your recent project?

- V. well
- 1
- 2
- 3
- 4
- 5
- V. poorly

19. Please give one or two examples of why you believe the software gave either good or poor support for your methodology/theoretical approach.
20. What were your expectations of the software package before you used it? (Tick as many as apply even if your expectations turned out to be wrong.)

- Would interpret the data for me
- Would make the analysis easier
- Would be hard to learn
- Would be hard to use
- Would organise my data
- Would save me time
- Facilitate more in depth searches
- Would only help with coding
- Keep me distant from data
- Would support teamwork
- It’s only for grounded theory
- That it was a kind of quantitative analysis
- That it would work like a statistical software package
- That I would need to be very organised
- Other (please state)

21. What were the most useful feature/tools in this software package for the kind of work you were/are doing in your recent project?

22. Was there anything the software would not allow you to do?

23. What did you find were the most difficult aspects of the software package to grasp?

24. Are there any pitfalls in using the software package?
Section 4 – Your suggestions.

This section is to help us decide how to prepare our on-line learning materials to support qualitative data analysis and qualitative data analysis software users.

25. What topics do you think should be given priority for inclusion in the on-line materials? (Tick as many as apply.)

- Operating systems issues
  - General computer use
  - Using Virtual PC
  - Upgrading
  - Saving/Backing up
  - Moving projects between PC’s
  - Display problems

- Coding issues
  - How/what to code
  - Thematic coding
  - Organising codes
  - Coding graphics & video

- Interrogating the database
  - Searching
  - Text/Lexical searching
  - Interrogating codes

- Packages
  - Choosing a package
  - Limits in file size
  - Software compatibility with
  - Theory/Methodology

- Format
  - Formatting text
  - Data in non-English languages
  - Line numbering

- Headings/sections/paragraphs
- File formats

- Software uses
  - Doing a literature review
  - Keeping references
  - Project management

- Group work
  - Merging projects
  - Teamwork
  - Emailing a project

- Tools
  - Memos
  - Coding stripes/brackets
  - Command files
  - Groups/Sets/Families
  - Variables/similarities/Attributes
  - Linking data and files
  - Inter-coder reliability

- Importing/Exporting files
  - Importing files
  - Exporting files
  - Importing tables

- Qualitative Data Analysis
  - Using mixed methods
  - Statistics and QDA
Types of analysis □
Reporting/writing up □

Digital video recording □
Digital audio recording □

Training information
Sources of training □
About teaching the software □

Models
Creating networks □
Using graphical models □

Complimentary software
Voice recognition software □

Other (please state)

Thanks for completing this questionnaire. When you have done, click on the Send button to send your answers to us. To start again, click on the Reset WARNING this will clear all the answers you have already given.
Online Support for QDA and CAQDAS: Evaluation of Learning Needs

REFERENCE No. RES-333-25-0009

Researchers
Mr Graham R. Gibbs, University of Huddersfield
Professor Nigel Fielding, University of Surrey
Ann Lewins, University of Surrey

Web based Questionnaire
Evaluation of Learning Needs in QDA and CAQDAS

(This is a text version of the web pages used for the questionnaire in the survey)

This questionnaire is stage 3 of the project ‘Online Support for QDA and CAQDAS and Evaluation of Learning Needs’ funded by the UK Economic and Social Research Council. The investigation is being undertaken by academics from the University of Huddersfield and University of Surrey, UK.

See the project home page.

This project will produce a web-based means of continuing support for those needing advice on qualitative data analysis (QDA) and those learning to use a Computer Assisted Qualitative Data Analysis Software (CAQDAS) package.

Section 1 - About your project

In questions 1 to 7 please answer in terms of your current project or your principal project if you are engaged in more than one

1

What role most closely fits your current position? (Please select one)

Undergraduate
Masters student
PhD student
Lecturer/Professor
Research assistant
Research officer
Research director
Other

1.1
If you selected "other", please give details

2
Which of the following best describes the kind of organisation within which your project is based? (Please select one)

Central/Federal Government
Local/Regional/State Government
Research Company
Charity/Voluntary sector
University
Health service/Hospital
Other

2.1
If you selected "other", please give details

3
Who funds the project?

Central/Federal Government
Local/Regional/State Government
UK Research council
EU
Charity/Voluntary sector
University funded
Health service/Hospital
Private sector
Other

3.1
If you selected "other", please give details

4
Where are you based?

UK
EU
Elsewhere in Europe
USA or Canada
Central or South America
Africa or Middle East
Australia, New Zealand or Oceania
Asia

5

Which of the following methodologies/theoretical approaches are you using? (Please tick as many as are relevant to your current project or your principal project if you are engaged in more than one)

Action Research
Conversation analysis
Constructivism
Discourse analysis
Ethnography
Ethnomethodology
Frame analysis
Framework method
Genre analysis
Grounded theory
Hermeneutics
Interpretative Phenomenological Analysis
Life History/Biography
Life-World Analysis
Memory work
Narrative analysis
Phenomenology
Objective hermeneutics
Symbolic interactionism
Template analysis
Others

5.1
If you selected "other", please give details

6

On this project are you working on your own or as part of a team?

On my own    As part of a team

7

How long is this project scheduled to last from beginning to end?

1 to 3 months
4 to 6 months
7 months to 1 year
13 months to 2 years
Over 2 years but less than 3 years
Over 3 years but less than 4 years
Over 4 years but less than 5 years
5 years or more

Section 2 - About you

8

Which of the following best describes your current principal discipline? (Please select ONE)

Accounting
Anthropology
Architecture
Archaeology
Business
Criminology
Cultural Studies
Economics
Education
Food Science
Geography
Health
History
Journalism
Law
Marketing
Management
Medicine
Nursing
Pharmacology
Physical Education
Politics
Psychology
Social Administration
Social Policy
Social Work
Sociology
Other

8.1
If you selected "other", please give details

9

What formal training have you received in qualitative data analysis (QDA)? (Please tick as many boxes as are relevant to you)

I received formal training as part of my undergraduate degree
I used qualitative methods in my undergraduate dissertation/extended paper
I received formal training as part of my postgraduate taught course
I used qualitative methods in my master's dissertation
I received formal training during the course of my PhD
In-house (non-university) training
None; I am self-taught in qualitative data analysis
Other (please state)

9.1
If you selected "other", please give details

10

In the field of qualitative methodology my current priorities for further training are (Rate from 1: high priority to 5: low priority):

10.1
Basics of qualitative data collection
High priority 1 2 3 4 5 Low priority

10.2
Advanced aspects of qualitative data collection
High priority 1 2 3 4 5 Low priority

10.3
Basics of qualitative data analysis
High priority 1 2 3 4 5 Low priority

10.4
Advanced aspects of qualitative data analysis
High priority 1 2 3 4 5 Low priority

10.5
Basics of qualitative software
High priority 1 2 3 4 5 Low priority

10.6
Advanced aspects of qualitative software

High priority  1  2  3  4  5 Low priority

10.7

Basics of qualitative research on the web, secondary analysis & other IT

High priority  1  2  3  4  5 Low priority

10.8

Advanced aspects of qualitative research on the Internet, secondary analysis & other IT

High priority  1  2  3  4  5 Low priority

11

Please tell us what you found the most difficult about doing qualitative data analysis as you were learning?

12

How easy or difficult do you now find the following aspects of qualitative data analysis (Rate from 1: Very easy to 5: Very difficult)?

12.1

Data preparation/transcription

Very easy  1  2  3  4  5 Very difficult

12.2

Sorting data

Very easy  1  2  3  4  5 Very difficult

12.3

Coding data

Very easy  1  2  3  4  5 Very difficult
12.4
Finding patterns in the data
Very easy 1 2 3 4 5 Very difficult

12.5
Finding relationships in the data
Very easy 1 2 3 4 5 Very difficult

12.6
Keeping on top of all the data
Very easy 1 2 3 4 5 Very difficult

12.7
Linking findings with theory
Very easy 1 2 3 4 5 Very difficult

12.8
Writing the final reports/dissertation/thesis
Very easy 1 2 3 4 5 Very difficult

13
Have you ever analysed qualitative data without using a software package?
Yes  No

If you answered Yes to Question 13, please continue to question 14; if you answered No, please go to question 15.

14
What were your main reasons for deciding not to use a software package to analyse your qualitative data? (Please tick as many boxes as are relevant to you)
No time to use software
Data set too small
Would take too long to learn
No access to software
Cost of training was too much
No access to training
No local support for software use
I was advised not to use software, by (please give adviser's role only)
Software did not support methodologies/theoretical approach I use/used
Using software would keep me too distant from my data
No training workshop had a place available when I needed it
I am waiting to do a training workshop before I use the software
I was not aware such software existed
Other (please give details):
15

Have you ever used a software package to analyse qualitative data?

No   Yes

If you answered No to Question 15, please go to question 28; if you answered Yes, please now continue from question 16 (Section 3).

Section 3 - About your use of the software

In this section please answer in terms of the most recent project in which you used a software package to assist with data analysis

16

At what point in the project was it decided to use a software package? (Please select ONE)

Proposal

Start of project
During data collection
Just before starting analysis
During data analysis
Don't know
17

What is the principal software package you have used for qualitative data research in this project? (Please select ONE; if you used more than one, please give details at question 17.2)

Alceste
Annotape
AnSWR
AQUAD
Atlas.ti
BEST
CDC EZ-Text
C-I-SAID
CQDA 3
Coder
Concordance
Ethno 2
HyperQual3
Hyper RESEARCH
Interclipper
KIT
KWALITAN
MAXqda
QCA
QDA Miner
NUD*IST (N4/N5/N6)
QSR NVivo
Qualifiers
Qualitative Media Analyser
Qualrus
TAMS Analyser
TATOE
TextBase Gamma
The Ethnograph
The Observer
Transana
Transcriber/PC & Mac
winMAX
Microsoft Word or other word processor (excluding use for transcription)
WordStat
Xcite
Other

17.1
If you selected "other", please give details

17.2
If you use more than one of the software packages listed above, please list the others here

In respect of the principal software package selected at question 17:
18

How long have you been using the software package (in whatever version) in total? (Please select)

- Less than 6 months
- 6 months to 11 months
- 1 year to 2 years
- Over 2 yrs. & less than 3 yrs.
- 3 years or more

19

How long, approximately, did you have to use the software package REGULARLY before you felt you were using it effectively? (Please select)

- 1 day
- 1 week
- 1 month
- 6 months
- 1 year
- Over 1 year

20

Everyone can do with help when learning new software. Please tell us what you found frustrating when learning to use the software. (Please tick as many boxes as are relevant to you)

- Not having enough training in QDA
- Not having enough CAQDAS Training
- Not having enough local support or expertise
- Awkward or infrequent access to the software
- Other

- None of the above, I had sufficient support to prepare to use the qualitative software package
20.1
If you selected "other", please give details

21
How well did the software package support your methodology/theoretical approach in your recent project? (Rate from 1: Very well to 5: Very poorly)

Very well  1  2  3  4  5 Very poorly

22
Please give one or two examples of why you believe the software gave either good or poor support for your methodology/theoretical approach.

23
What were your expectations of the software package before you used it? (Tick as many as apply even if your expectations turned out to be wrong.)

Would interpret the data for me
Would make the analysis easier
Would be hard to learn
Would be hard to use
Would organise my data
Would save me time
Facilitate more in depth searches
Would only help with coding
Keep me distant from data
Would support teamwork
It's only for grounded theory
That it was a kind of quantitative analysis
That it would work like a statistical software package
That I would need to be very organised
Other
If you selected "other", please give details

What were the most useful feature/tools in the software package for the kind of work you were/are doing in your recent project?

Was there anything the software would not allow you to do?

What did you find were the most difficult aspects of the software package to grasp?

Are there any pitfalls in using the software package?

Section 4 - Your suggestions

This section is to help us decide how to prepare our on-line learning materials to support qualitative data analysis and qualitative data analysis software users

What topics do you think should be given priority for inclusion in the on-line materials? (Tick as many as apply.)

Operating systems issues

General computer use

Using Virtual PC

Upgrading

Saving/Back ing up

Moving projects between PCs

Display problems

Coding issues
How/what to code

Thematic coding

Organising codes

Coding graphics & video

28.3

Interrogating the database

Searching

Text/Lexical searching

Interrogating codes

28.4

Packages

Choosing a package

Limits in file size

Software compatibility with Theory/Methodology

28.5

Format

Formatting text

Data in non-English languages

Line numbering

Headings/sections/paragraphs

File formats

28.6

Software uses
Doing a literature review
Keeping references
Project management

28.7
Group work
Merging projects
Teamwork
Emailing a project

28.8
Tools
Memos
Coding stripes/brackets
Command files
Groups/Sets/Families
Variables/similarities/Attributes
Linking data and files
Inter-coder reliability

28.9
Importing/Exporting files
Importing files
Exporting files
Importing tables

28.10
Qualitative Data Analysis

Using mixed methods

Statistics and QDA

Types of analysis

Reporting/writing up

28.11

Training information

Sources of training

About teaching the software

28.12

Complementary software

Voice recognition software

Digital video recording

Digital audio recording

28.13

Models

Creating networks

Using graphical models

28.14

Other

please check

28.14.2
If you selected "other", please give details

29

Anything else you may wish to add that may help us
Questions for interviews

1. What is your role?
2. What is your discipline?
3. What training did you receive in QDA and for how long?
4. What training did you receive in CAQDAS and for how long?
5. What other sources of information/literature did you use?
6. What type of project(s) were you working on when using the software?
7. Which methodology(s) were you using?
8. How was a CAQDAS package selected?
9. At what point in the project(s) had the decision been made to use the software?
10. Where were you using CAQDAS alone or in a team?
11. What were your expectations of the CAQDAS package when you first decided to use it?
12. Was the use of the software for the project duration or ongoing with other projects?
13. How long have you been using the package?
14. How long did it take for you to be able to use the software effectively (learning curve)?
15. What would have improved your learning curve?
16. How did you apply your chosen methodology(s) to the CAQDAS package tools?
17. What was the time scale of the project?

18. How long did this allow for coding and retrieving?

19. What words would you use to describe your experience of using the CAQDAS package?

20. How did the CAQDAS package compare to any previous methods you had used to analyse this type of data?
Topics to be discussed

1. Role
   a. role

2. Project details
   a. Type of project
   b. Working in team or individually
   c. Chosen methodologies
   d. Point in project that considered CAQDAS, how was a package selected

3. Training
   a. Any training in QDA, for how long - how useful was it....was it enough to equip you with skills you needed/will need
   b. Any training in CAQDAS, for how long

4. Timescale
   a. What was project timescale
   b. Influence of available time on coding and analysis

5. Availability of information and support
   a. What information/literature and training/support was helpful and why
   b. Could you access all the info/lit and training/support you required

6. Learning curve
   a. How long used package
   b. How long till you could use the software effectively
   c. What would have improved this learning curve
7. Methodology
   a. Was use of software short term (one project) or long term (many projects)

8. Expectations
   a. What were your expectation of the software before you used it

9. Experience/Evaluation
   a. How easy to apply methodology to software tools
   b. Most useful features/tools
   c. Features lacking in software
   d. Most difficult aspects to grasp
   e. Any pitfalls of using the package
   f. whether you used software or not– was there any point at which you felt stuck – some sort of block?
   g. If so – can you explain it and how you got beyond it?
   h. How did you decide the end point of the analysis
   i. How did package compare to previous methods
   j. Words to describe your experience of the software
   k. Training or information that would improve you use of package
   l. Advantages and disadvantages
   m. Would use the same package again or another

10. Reasons for not using software
    a. Reasons/Deciding factors for not using software
b. Influence of availability of training, info/literature or advice/support on this decision

11. Advantages and disadvantages of chosen analysis method

(CAQDAS or paper/manual format)
Topics to discuss with trainers

1. Background of people being training
2. Types of projects and length
3. Or are they students at your institution?
4. Stage in research project they come for training
5. If teaching CAQDAS software is part of their curriculum – how do you teach it? How many sessions?
6. Do they get any support after the training? How do you feel they cope with software
7. People expectations of the software
8. Application of Methodologies/Theoretical approach
9. Training in QDA
10. Training CAQDAS
11. Literature/information that you direct people too
12. What are the main problems have with CAQDAS
13. What are the software specific problems
14. Why are they having these problems?
15. What helps people work through the difficulties?
16. Most useful tools
17. Most difficult tools
18. Do you provide any advice in planning a project
19. How long is a typical learning curve
20. Materials you would like to see available online
Dear All!

Volunteers are required for a new ECSR funded project to compliment the CAQDAS Networking Project called “Online Support for QDA and CAQDAS and Evaluation Needs” further information can be found at: [www.caqdas.soc.surrey.ac.uk/caqdas/onlineqda/](http://www.caqdas.soc.surrey.ac.uk/caqdas/onlineqda/)

Briefly the project aims to develop online learning materials to provide ‘just-in-time’ support to those new to Qualitative Data Analysis and/or Computer Assisted Qualitative Data Analysis Software. The materials will be for those teaching themselves or those who have attended a CAQDAS Networking Project workshop.

The materials will ‘plug the gap’ in applying Qualitative Data Analysis methodologies to the tools in a selected number of the most widely used Computer Assisted Qualitative Data Analysis Software packages.

**Why we need your help:**

We require volunteers to help us identify what topics need to be covered and to test the learning materials we develop, giving feedback on the suitability of topics covered and the delivery style.

The attachment provides details of how you can become involved in the project. At certain stages of your involvement, **free support** from us is a necessary part of our involvement with you. In any case, we hope that your contact with us will help you and others to get some of the general support you need, when using qualitative methods and CAQDAS software.

(Attachment – content below)

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**Formative Evaluation**

**Stage 1. Observed using the software: 1 hr**

We will observe and listen to a selection of users as you use software. Using ‘think aloud’ protocols we will hope to get a clearer idea of what tools you use and how, and where you feel you need help, if at all? If you need any help we’ll make this a support session to move you forward in your use of software.

**Stage 2. Fill out Questionnaire**

Fill in a questionnaire about your knowledge and experience of QDA & CAQDAS. This will give us an understanding of how it’s going, how it
went, what you used, what training you got, and what further help you feel you might have needed or need now.

**Summative Evaluation**

**Stage 3.** Take part in user a trial of the prototype web materials.
Be observed using the prototype and give your feedback

**Stage 4.** Take part in a user trial of the full version
Be observed using the prototype and give your feedback
Information sheet for participants

Online Support for QDA and CAQDAS and Evaluation of Learning Needs

Stage One – Observed using the software

Invitation to participate
You are invited to take part in a research study. Please take your time to read the following information about the research and what it will involve. If you need any further information there is a contact number at the end of this document or you can email us.

What is the purpose of the study?
The purpose of this research is to develop online learning materials which will help researchers learn the basics of Qualitative Data Analysis (QDA) and Computer Assisted Qualitative Data Analysis Software (CAQDAS) packages [http://caqdas.soc.surrey.ac.uk/caqdas/onlineqda/qdahome.htm](http://caqdas.soc.surrey.ac.uk/caqdas/onlineqda/qdahome.htm). The materials will be suitable for those teaching themselves about QDA and/or CAQDAS or to work through after attending a CAQDAS Networking Project workshop [http://caqdas.soc.surrey.ac.uk/caqdas/index.htm](http://caqdas.soc.surrey.ac.uk/caqdas/index.htm). The aim is to ‘plug the gap’ in applying QDA methodologies to the tools in a selected number of the most widely used CAQDAS packages.

During stage one you will be observed for one hour using the software. Using ‘think aloud’ protocols you will speak aloud your thoughts as you use the software. This will help us to identify the areas where learners like you need help and will determine which topics need to be covered in the online learning materials.

Why have I been selected?
We are interested in the experience of people in the early stages of learning QDA and/or CAQDAS to find out the difficulties they encounter.

Do I have to take part?
No. It is up to you. We would like you to help us, but it is up to you to decide whether to take part. If you do decide to take part, you may still withdraw from the research at any time without needing to give us a reason.

What happens if I do take part?
If you agree to take part you will be asked to email or telephone Ann Lewins to arrange a time to be observed using the software.

Confidentiality
We aim to keep the information you provide confidential. The data will be stored in compliance with the Data Protection Act. We may publish our results at the end of the project but we will ensure that there is no way individuals can be identified either by name or by context.

What are the benefits?
The learning materials that are produced based on the findings of this project will be available on-line, providing ‘just-in time’ support to researchers. In the main, it will be future researchers who will benefit. This is your chance to guide researchers through the pitfalls of QDA and CAQDAS.

Who is organising the research?
The project is being undertaken by four academics based at two different universities in the UK. It is collaboration between the Dept. of Behavioural Sciences at the University of Huddersfield and the Dept. of Sociology at the University of Surrey. The research is funded by the Economic
Social Research Council (ESRC). The Research Methods Programme [http://www.ccsr.ac.uk/methods/](http://www.ccsr.ac.uk/methods/) forms part of Council’s strategy to improve the standards of research methods across the UK social science community and is based at the University of Manchester.

**Contact for further information**

Ann Lewins, Department of Sociology, University of Surrey, Guildford, Surrey, GU2 7XH. Tel: 01483 689455 Email: a.lewins@surrey.ac.uk

Celia Taylor, Department of Behavioural Sciences, University of Huddersfield, Queensgate, Huddersfield. HD1 3DH. Tel: 01484 473611 Email: c.p.taylor@hud.ac.uk
Information sheet for participants

Online Support for QDA and CAQDAS and Evaluation of Learning Needs

Stage One – Observed using the software

Invitation to participate
You are invited to take part in a research study. Please take your time to read the following information about the research and what it will involve. If you need any further information there is a contact number at the end of this document or you can email us.

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During stage one you will be observed for one hour using the software. Using ‘think aloud’ protocols you will speak aloud your thoughts as you use the software. This will help us to identify the areas where learners like you need help and will determine which topics need to be covered in the online learning materials.

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Celia Taylor, Department of Behavioural Sciences, University of Huddersfield, Queensgate, Huddersfield. HD1 3DH. Tel: 01484 473611 Email: c.p.taylor@hud.ac.uk
Information sheet for participants

Online Support for QDA and CAQDAS and Evaluation of Learning Needs

Stage Two – Interviews

Invitation to participate
You are invited to take part in a research study. Please take your time to read the following information about the research and what it will involve. If you need any further information there is a contact number at the end of this document or you can email us.

What is the purpose of the study?
The purpose of this research is to develop online learning materials which will help researchers learn the basics of Qualitative Data Analysis (QDA) and Computer Assisted Qualitative Data Analysis Software (CAQDAS) packages [http://caqdas.soc.surrey.ac.uk/caqdas/onlinqda/qdahome.htm](http://caqdas.soc.surrey.ac.uk/caqdas/onlinqda/qdahome.htm). The materials will address common problems (both early and advanced) of qualitative data analysis and computer usage. We expect to do this in generic ways but also with some specific practical advice for software programs. These materials are intended to complement workshops NOT replace them.

During stage two you will be interviewed by Celia Taylor, the Research Fellow on the project, or Ann Lewins of the CAQDAS Networking Project, about your experiences of using QDA methodologies and CAQDAS packages. The interview will be recorded and transcribed by a transcription service.

Why have I been selected?
We are interested to find out under what circumstances you came to use QDA methodologies and/or CAQDAS and what were the issues of using them.

Do I have to take part?
No. It is up to you. We would like you to help us, but it is up to you to decide whether to take part. If you do decide to take part, you may still withdraw from the research at any time without needing to give us a reason.

What happens if I do take part?
If you agree to take part you will be asked to email or telephone Celia Taylor to arrange a time and place to be interviewed either in person or via the telephone.

Confidentiality
We aim to keep the information you provide confidential. We may publish our results at the end of the project but we will ensure that there is no way individuals can be identified either by name or by context.

What are the benefits?
The learning materials that are produced based on the findings of this project will be available on-line, providing ‘just-in time’ support to researchers. In the main, it will be future researchers who will benefit. This is your chance to guide researchers through the pitfalls of using QDA and CAQDAS.

Who is organising the research?
The project is being undertaken by four academics based at two different universities in the UK. It is collaboration between the Dept. of Behavioural Sciences at the University of Huddersfield and the Dept. of Sociology at the University of Surrey. The research is funded by the Economic & Social Research Council (ESRC). The Research Methods Programme
http://www.ccsr.ac.uk/methods/ forms part of Council's strategy to improve the standards of research methods across the UK social science community and is based at the University of Manchester.

Contact for further information
Celia Taylor, Department of Behavioural Sciences, University of Huddersfield, Queensgate, Huddersfield. HD1 3DH. Tel: 01484 473611 Email: c.p.taylor@hud.ac.uk
Information sheet for participants (trainers)

Online Support for QDA and CAQDAS and Evaluation of Learning Needs

Stage Two – Interviews

Invitation to participate

You are invited to take part in a research study. Please take your time to read the following information about the research and what it will involve. If you need any further information there is a contact number at the end of this document or you can email us.

What is the purpose of the study?

The purpose of this research is to develop online learning materials which will help researchers learn the basics of Qualitative Data Analysis (QDA) and Computer Assisted Qualitative Data Analysis Software (CAQDAS) packages http://caqdas.soc.surrey.ac.uk/caqdas/onlineqda/qdahome.htm. The materials will address common problems (both early and advanced) of qualitative data analysis and computer usage. We expect to do this in generic ways but also with some specific practical advice for software programs. These materials are intended to complement workshops NOT replace them.

During stage two you will be interviewed by Celia Taylor, the Research Fellow on the project, about your experiences of teaching CAQDAS packages. The interview will be recorded and transcribed by a transcription service.

Why have I been selected?

We are interested to find out about your experiences of teaching CAQDAS packages.

Do I have to take part?

No. It is up to you. We would like you to help us, but it is up to you to decide whether to take part. If you do decide to take part, you may still withdraw from the research at any time without needing to give us a reason.

What happens if I do take part?

If you agree to take part you will be asked to email or telephone Celia Taylor to arrange a time and place to be interviewed either in person or via the telephone.

Confidentiality

We aim to keep the information you provide confidential. We may publish our results at the end of the project but we will ensure that there is no way individuals can be identified either by name or by context.

What are the benefits?

The learning materials that are produced based on the findings of this project will be available on-line, providing ‘just-in time’ support to researchers. In the main, it will be future researchers who will benefit. This is your chance to guide researchers through the pitfalls of using QDA and CAQDAS.

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The project is being undertaken by four academics based at two different universities in the UK. It is collaboration between the Dept. of Behavioural Sciences at the University of Huddersfield and the Dept. of Sociology at the University of Surrey. The research is funded by the Economic & Social Research Council (ESRC). The Research Methods Programme http://www.ccsr.ac.uk/methods/ forms part of Council’s strategy to improve the standards of
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Information sheet for participants

Online Support for QDA and CAQDAS and Evaluation of Learning Needs

Stage Three – Questionnaire Survey

Invitation to participate
You are invited to take part in a research study. Please take your time to read the following information about the research and what it will involve. If you need any further information there is a contact number at the end of this document or you can email us.

What is the purpose of the study?
The purpose of this research is to develop online learning materials which will help researchers learn the basics of Qualitative Data Analysis (QDA) and Computer Assisted Qualitative Data Analysis Software (CAQDAS) packages http://caqdas.soc.surrey.ac.uk/caqdas/onlineqda/qdahome.htm. The materials will be suitable for those teaching themselves about QDA and/or CAQDAS or to work through after attending a CAQDAS Networking Project workshop http://caqdas.soc.surrey.ac.uk/caqdas/index.htm. The aim is to ‘plug the gap’ in applying QDA methodologies to the tools in a selected number of the most widely used CAQDAS packages.

During stage three you will be asked to fill out a questionnaire on your experiences of using the QDA methodologies and CAQDAS packages.

Why have I been selected?
We are interested to find out under what circumstances you came to use QDA methodologies and/or CAQDAS and what were the issues of using them.

Do I have to take part?
No. It is up to you. We would like you to help us, but it is up to you to decide whether to take part. If you do decide to take part, you may still withdraw from the research at any time without needing to give us a reason.

What happens if I do take part?
If you agree to take part you will be asked to email Celia Taylor an electronically completed consent form. You will then be asked to visit a website and complete the questionnaire and submit it using the link provided.

Confidentiality
We aim to keep the information you provide confidential. We may publish our results at the end of the project but we will ensure that there is no way individuals can be identified either by name or by context.

What are the benefits?
The learning materials that are produced based on the findings of this project will be available on-line, providing ‘just-in time’ support to researchers. In the main, it will be future researchers who will benefit. This is your chance to guide researchers through the pitfalls of using QDA and CAQDAS.

Who is organising the research?
The project is being undertaken by four academics based at two different universities in the UK, the Department of Behavioural Sciences at the University of Huddersfield and the Department of Sociology at the University of Surrey. The research is funded by the Economic & Social Research Council (ESRC). The Research Methods Programme http://www.ccsr.ac.uk/methods/
forms part of Council's strategy to improve the standards of research methods across the UK social science community and is based at the University of Manchester.

**Contact for further information**
Celia Taylor, Department of Behavioural Sciences, University of Huddersfield, Queensgate, Huddersfield. HD1 3DH. Tel: 01484 473611 Email: c.p.taylor@hud.ac.uk
Online Support for QDA and CAQDAS and Evaluation of Learning Needs

Celia Taylor at the University of Huddersfield will conduct the research.

Celia Taylor, Department of Behavioural Sciences, University of Huddersfield, Huddersfield, HD1 3DH.
Tel: 01484 473611  Email: c.p.taylor@hud.ac.uk

Participant Consent Form        (please tick)

1. I confirm that I have read and understood the information sheet for the above study

2. I understand the purpose of the study and how I will be involved

3. I have had the opportunity to ask questions and discuss the study, by contacting the researcher, if I so wished

4. I agree to be interviewed and to this interview being tape-recorded

5. I understand that all the information collected in the study will be kept secure and that if it is presented or published any information which might identify me will be removed.

6. I agree to the use of anonymised quotations from my interview in research publications and other learning materials produced by the project.

7. I confirm that I have decided to take part in this study of my own free will and I understand that I may withdraw from it at any time without giving a reason

______________________ ___________ ______ _________________
Name of Participant   Date   Signature

______________________ ___________ ______ _________________
Name of Person taking  Date   Signature
Consent (if not researcher)

______________________ ___________ ______ _________________
Name of Researcher  Date   Signature