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Moving beyond themes: Reimagining the qualitative analysis curriculum

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Moving Beyond Themes:

Reimagining the Qualitative Analysis Curriculum

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Teaching novice qualitative researchers how to move beyond first-cycle themes is a challenging endeavor. In this essay, we articulate four harmful habits that tend to impede our success: moving too quickly, privileging product over process, providing cursory coverage of analytic technique and artistry, and overlooking the role of synthesis in qualitative research. As a step toward replacing harmful habits with more healthy ones, we offer a number of practical suggestions for reimagining the qualitative research methods curriculum.

Keywords: qualitative analysis; research methods; pedagogy

When qualitative research is good, it is really good. The authors of the best qualitative studies transport us into the inner worlds of other persons, groups, organizations, communities, and cultures. They offer unique insights that illuminate lived experience and meaning-making. They capture intriguing or insightful facets of the human condition. Sometimes—even when they ostensibly are writing about someone or something else—they teach us something about ourselves. But we all

have read qualitative studies that do not generate nearly the same effects. In these cases, authors typically have taken inventory of participants' words and actions—reducing and sorting human experience into categories, bins, types, and groups—and have left us with little more than surface-level description or confirmation of common knowledge. It is not that these kinds of studies are inherently *bad* qualitative research. They simply are incomplete. At issue is that researchers have stopped their analysis short and have not yet revealed what lies below the surface. Put another way, they have not "moved beyond the themes."

Themes are a staple of all qualitative research, so we certainly are not condemning the use of the term or the data-organizing practice. We use it ourselves in our own research. Instead, when we write about "moving beyond themes," we refer specifically to a certain kind of theme: that first-pass categorization of data, which includes basic, descriptive categories presented at a low level of abstraction and fragmented from a larger whole. We will refer to these as "first-cycle themes." Importantly, first-cycle themes can serve as a basis for insightful interpretation. But compelling insights and aha moments do not come from an inventory of responses. They arise from deeper analysis and interpretation requiring extensive engagement with participants' emergent discourses, existing theory, and the contexts in which they all are embedded.

But where and how do qualitative researchers learn to do this kind of sustained and probing analysis? Besides the one-on-one mentoring they may receive from an adviser as they write their dissertation, there usually are precious few opportunities to be coached and critiqued in the practice of analysis. Our sense is much coaching occurs during the journal review process through carefully guided revisions. Sometimes a researcher's first-cycle themes will have just enough of a spark (or "hook" or "nugget") to warrant an opportunity to revise and resubmit. Then, with encouragement, direction, and mentoring from dedicated blind reviewers and editors, the researcher can delve deeper into analysis, engage with theory, and re-craft themes in ways that engender novel insights and make a contribution. Unfortunately, many novices never get this important opportunity to hone their skills, as their manuscripts get dead-ended in the process by a number of factors, not the least of which is their first-cycle themes are too surface-level to warrant investment in the manuscript.

The challenge to qualitative research faculty, then, is to reimagine ways of teaching qualitative analysis such that our students (and ourselves)

develop the skills necessary for consistently producing higher quality, more insightful research that moves beyond first-cycle themes. To this end, we articulate four harmful habits that inform how we tend to write about, think about, and teach qualitative analysis. We admit that our perceptions of what the collective "we" are doing may be skewed. The experiences we draw upon are our own as graduate students first introduced to qualitative analysis; as faculty members charged with teaching the subject; as journal reviewers who provide feedback on qualitative manuscripts; as colleagues who engage in (inter-)disciplinary discussion and debate about qualitative research merits and methods; and as researchers who conduct our own qualitative studies. While we certainly acknowledge that not everyone commits these harmful habits, our experiences point to particular areas where collectively we could do a better job of preparing the next generation of qualitative researchers. As a step toward replacing these harmful habits with healthy ones, we conclude by reimagining the qualitative analysis curriculum.

Harmful Habits in Teaching Qualitative Analysis

We organize our essay around four overlapping, harmful habits that hinder sophisticated qualitative analysis. By harmful habits we mean some of the problematic ways in which we talk about and teach qualitative analysis. These acquired patterns of behavior develop for a variety of reasons, ranging from continuing to do things as they have been done before without deeper reflection to wanting to do things differently, but being constrained by time, resources, and departmental demands. To be sure, we have found ourselves guilty of these habits at times. Our hope is that in crafting the conversation in this way, we can seek out points of transformation and change.

Moving Quickly When Analysis is Inherently Slow

Our first harmful habit is the tendency to conduct "quick and dirty" analyses. Yet anyone who has taken on a significant qualitative research project knows it is a painstakingly slow endeavor. And it is not just because of the hours spent in the field and later writing fieldnotes, or interviewing and later transcribing these interactions, although these certainly are time-consuming undertakings. The real time-intensive work lies with analysis. It is during analysis that researchers can sometimes spend *years* engaging with qualitative materials collected from the

field as they come to understand the phenomena they are studying. In our own research we have found that artifacts of an hour-long observation or interview might be examined for 15, 30, or more hours by the time we finalize our interpretation. Yet there is little, if any, indication of this slowness in published research, textbooks, and courses.

One of the major stumbling blocks to good qualitative analysis is that students of qualitative research methods have little appreciation of its slowness and, even more harmfully, may expect qualitative research in general, and qualitative analysis in particular, to be accomplished quickly. When students read research exemplars, they see time and again that interviews, focus groups, and fieldnotes simply were "coded" and "themes emerged" (see Lindlof & Taylor, 2011). This woefully-truncated version of reality typically lacks any indication of the time involved in the process. Some of the best qualitative methods texts dedicate relatively little space (as akin to time) to analysis. Maxwell (2013) spends the better part of one chapter of seven on analysis; Lindlof and Taylor (2011) one of nine; Tracy (2013) two of fourteen; Baxter and Babbie (2004) one of four within the section on qualitative research. Judging by such coverage, it may seem to a casual observer that analysis plays a minor role in the overall research process.

Even more problematically, many qualitative methods courses "cover it all" in a single semester: epistemological and ontological assumptions, study design, IRB training, multiple data collection strategies, data management, analysis, and presentation of results. As we see it, there are at least two problems with this approach. First, it compels cursory coverage of each topic, as there is little time available before moving onto the next. Consequently, the analysis unit, usually covered in a span of a couple weeks, fails to account for the multiple variations and diverse analytic approaches available to qualitative researchers. Second, inherent in this approach is the expectation that a student be able to execute a full, conference-quality qualitative study (from conceptualization, to IRB-approval, to data collection and analysis, to writing) in a single semester. Consider the time investment: Even a small project with 5–10 interviews could require up to 40 hours for data collection and transcription. Add to that the requirement of writing a 25-page manuscript, and it is no wonder students can be overheard flippantly discussing their plans to "crank out a paper." In our experiences, requiring a completed paper encourages students to shortchange data analysis and theoretical immersion. Instead, students opt to spend most of their

time on data collection and paper-writing because those processes produce tangible outcomes (e.g., audio files, transcriptions, pages of text) that can be counted and evaluated easily. As a result, students' papers often feature a generic, boilerplate methods section and superficial first-cycle themes.

Privileging the Product and Marginalizing the Process of Analysis

Our second harmful habit is the tendency to privilege the product of analysis and marginalize the process. Data analysis is a messy, circuitous, and iterative process. Yet the ways in which we write about and teach qualitative research tend to present it as a tidy, linear, and straightforward product. In terms of published studies, Tracy (2012) laments that deductive writing conventions required by most scholarly journals provide a "disservice to pedagogy" (p. 116) in that deductively-written articles misrepresent real practices and the complexity of inductive analysis. Thus, although the purpose of reporting methods is to provide an account of how research was conducted, a deductive portrayal of an inductive process does not accomplish that goal. In fact, Tracy explains that when she and coauthors submitted a manuscript with a "layered inductive analysis," which reflected more fully the process by which their findings took shape, reviewers and the editor critiqued it as being "awkward," "inefficient," and "excessive" (p. 126). The requested revisions, which appear in the published version, include subtle nods to the messy and circuitous process, but largely follow the standard reporting of data collection and analysis. This is just one example of the ways a (fictive) product is privileged over process.

The privileging of product over process also trickles down into the classroom. The primary way it manifests itself is in the common practice of assigning conference-quality papers, often as a major component of a student's final grade. As noted in our discussion of the first harmful habit, students often are able to take shortcuts in analysis and camouflage these choices in the final product—especially when they collect the required amount of data and write reasonably well. Accordingly, grades based on the quality of final papers may or may not be indicative of the most rigorous or careful processes of analysis. Thus, this harmful teaching habit might actually serve to perpetuate the cycle by establishing detrimental research habits in our students.

A second important consequence of emphasizing the product over the process is students often fail to acknowledge or are unaware of the diverse and abundant analytic techniques available to qualitative researchers. In other words, shortchanging the time devoted to teaching analysis and directing most student efforts towards a completed manuscript means that we spend less time exposing students to analytic techniques beyond basic thematic analysis or a grounded theory approach. For instance, missing from many analysis units are opportunities to learn about (and to practice) techniques such as grounded practical theory (Craig & Tracy, 1995), discourse tracing (LeGreco & Tracy, 2009), narrative analysis (Chase, 2008), or politically attentive relational constructionism (Deetz, 2009). Even when these techniques are covered, students may hesitate to utilize them because of impending deadlines that privilege product over process.

Downplaying the Technique and Artistry of Analysis When Both are Necessary

Our third harmful habit is the tendency to strike a balance between technique and artistry by downplaying both. We take for granted that good qualitative inquiry is "a wonderful blend of strategic mindfulness and unexpected discovery" (Lindlof & Taylor, 2011, p. 242). Too much of either is detrimental to our work, especially when it comes at the expense of the other. On the one hand, focusing too much attention on technique makes analysis seem formulaic and dismisses the importance of creativity, intuition, and those magical moments that provide deep revelation about the human condition (Tracy, 2013). To talk about it primarily as an art, however, dismisses the rigor associated with qualitative analysis, including multiple levels and iterations of coding, memoing, linkages among various pieces of data, and other standards that ideally demonstrate a study's utility, plausibility, credibility, and transferability (Miles, Huberman, & Saldaña, 2014). In short, there is an implicit understanding that we need to balance both technique and artistry in qualitative analyses. But instead of striking that balance by emphasizing both, we tend to do so by downplaying both.

The technique of qualitative analysis is downplayed in published articles when the procedures for analysis are insufficiently explained. In fact, to someone unfamiliar with qualitative research, an examination of most qualitative journal articles might suggest that the rigor

and technique of qualitative research lies with data collection. Indeed, many qualitative articles describe in detail the steps that happen before analysis, including recruitment strategies and demographics of participants; IRB approval and consent processes; data gathering descriptions about, for example, interviews or focus groups; and pages of transcripts yielded. What often follows is a brief boilerplate statement about analysis. Lindlof and Taylor (2011) observe, "Authors sometimes tell us their themes 'emerge' after repeated readings of data. But why those themes, and not others, emerged are matters about which readers are often forced to speculate" (p. 242). Missing from many accounts are descriptions of analysis: the choice of technique and the underlying assumptions and evaluative standards of that technique; the iterative processes of multi-level coding, including sample codes and examples from the data; the memoing; the follow-up correspondence with participants and how the authors addressed, if at all, alternative interpretations; and, depending on the approach, other steps taken to ensure confidence in the analysis. In classes, technique is downplayed when students are not required to practice and provide evidence of technique development (e.g., through incremental homework assignments), but instead are required to submit a final product.

The artistry of qualitative analysis is downplayed even more—often to the point of rendering it invisible. Published accounts lack behind-the-scenes explanations of the moments of discovery that generate meaningful illustrations of a diverse range of participant perspectives and experiences, show sensitivity to a range of voices and interpretations, and demonstrate a willingness to engage and critique the author(s)' own voice. Further, discussions of writing and rewriting as part of the research endeavor are sequestered into methods chapters instead of written explicitly and openly in research articles. Yet writing plays a central role in qualitative research, as both an analytic and artistic endeavor. It is a method by which researchers gain a fuller understanding of what they are uncovering as they work with numerous discourses and techniques. In conjunction with sound techniques, writing also is an aesthetic undertaking by which qualitative researchers shape their contribution and communicate the impact and significance of their work. Richardson and St. Pierre (2005) explain that aesthetic merit is an essential criterion for evaluating qualitative research, asking "Is the text artistically shaped, satisfying, complex, and not boring?" (p. 964). In methods courses, the artistry of qualitative analysis is downplayed when

students are not encouraged or supported in their efforts to pursue more imaginative and creative insights that move beyond their first-cycle themes.

Focusing Too Much on Analysis and Not Enough on Synthesis

Our last harmful habit is the tendency to emphasize analysis to the exclusion of synthesis. Analysis, by its dictionary definition, is about breaking a whole into parts for closer examination. But when we consider the best qualitative research articles, they are the ones that have a sense of wholeness. In short, moving beyond first-cycle themes is not about *analyzing* data further; it is about *synthesizing* it—about identifying interrelationships and meaningfully integrating diverse parts into a coherent whole. First-cycle themes are products of the most basic analysis. Baxter and Babbie (2004) deride the practice of not moving beyond first-cycle themes saying, "If all you do is create categories, your qualitative analysis is a listing enterprise" (p. 270). In fact, Tracy (2013) says that because it requires minimal interpretation, "first-level coding might even be delegated to a research assistant who knows little about the research project" (p. 189). In contrast, the most significant contributions are made by researchers who present findings they have synthesized in an insightful way—interlacing theory, context, application, critique, or other voices.

Unfortunately, the majority of efforts seem to be dedicated to teaching and talking about analysis (in fact, we do that in this essay). Although qualitative researchers regularly accomplish sophisticated syntheses, precious few published articles discuss synthesis in any depth (see Tracy, 2012, for a discussion about the way deductive writing conventions limit this possibility). Information regarding how to teach synthesis is scarce as well. Most qualitative analysis resources give guidance on how to code, hierarchically-cluster codes, develop data displays, and present analyzed data. The limited coverage of synthesis provided by qualitative methods texts discusses it with a mix of terms—for example, Miles et al. (2014) discuss moving from first-cycle codes to second-cycle *pattern* codes, whereas Maxwell (2013) discusses categorizing versus *connecting* strategies. Although analysis is a necessary step to get to synthesis, it constitutes an iterative segment of the hermeneutic and circular relationship between parts and wholes that cannot and should

not be viewed as an ending point. Thus, findings that amount to little more than reporting first-cycle themes defeat the purpose of qualitative research. That is, although a key strength of qualitative research is heralded as giving meaning to and deeply interpreting lived experience, when we fragment discourses from the very context that gives them meaning for the purposes of categorization, we miss the opportunity to share the understanding of those excerpts as embedded in a larger story (Maxwell, 2013).

Fortunately, researchers can synthesize data in a variety of insightful ways. The most common way is to put themes into conversation with theory. For instance, Tracy (2013) describes a study in which she connected themes to theory on sensemaking. Likewise, Maxwell (2013) explains how returning to extended exemplars and vignettes is a way to illustrate the deep connectedness between participants' discourses and the contexts within which they are embedded, thereby integrating themes with context. In our own research, we have synthesized themes in a variety of ways. For example, we have interpreted first-cycle themes by synthesizing them with a macro-level discourse that was not part of the interview protocol to understand processes of sociological ambivalence (Lucas, 2011); by integrating them within a larger ideological and political context to examine feminist organizational identity construction (D'Enbeau & Buzzanell, 2013); by synthesizing them into an organizing framework of organizational paradox to demonstrate problematic empowerment processes in domestic violence prevention (D'Enbeau & Kunkel, 2013); and by interweaving one participant group's discourses about their identities as workers with another group's discourses about the former group's place in the organization (Lucas & Steimel, 2009). Although there is no single right way to perform synthesis, the point is that it is a necessary step for making a significant contribution. But this step rarely is covered to the extent it should be in our courses.

Reimagining the Qualitative Analysis Curriculum

In this section, we present pedagogical suggestions inspired by our critique and offer alternatives to these harmful habits. Admittedly, neither of us has taught a course that looks exactly like the one we describe below. However, most of these ideas have been tried by one or both of us in some capacity: in teaching qualitative methods courses, in facilitating

research workshops, in mentoring advisees, and as a matter of informal practice. Our suggestions are intended not as a one-size-fits-all solution, but as a starting point and a springboard for other creative possibilities.

First, to recognize the inherent slowness of the qualitative research process, we need to dedicate much more time to teaching and practicing analysis. Given that courses already are overloaded with content, perhaps the best way to dedicate more time to analysis is by creating additional courses in the curriculum addressing analysis. For example, Suzy taught a two-course sequence on qualitative methods at the University of Kansas. The first semester covered the basics of research design and data collection; the second covered analysis. Additionally, we might offer advanced qualitative data analysis courses that delve much deeper into diverse approaches (e.g., grounded practical theory, narrative analysis), giving students extended practice in a range of qualitative approaches. Even if we must teach the course in a single semester, we can adjust it in ways that give students a better appreciation of the time involved in analysis that moves beyond first-cycle themes. For instance, instead of assigning a full set of in-depth interviews, we could assign students only one or two short interviews. They would still gain the experience of interviewing, but by shifting hours away from data collection, students would reclaim a significant number of hours for analysis. Then, with more time to practice qualitative analysis, students would learn firsthand the time commitment needed to produce meaningful results.

Second, to emphasize the *process* of qualitative data analysis over a final *product*, we need to embrace the messiness. One way we could do this is to dig into the back-story of exemplary qualitative articles. Tracy (2012, 2013) provides several back-stories of her own and others' work—such as one article that had an estimated 100 drafts, nine formal versions, and rejections from three journals over the course of five years. We could arrange for videoconferences with authors across the discipline to provide an opportunity for students to engage in discussion about the process. Another approach would be to examine carefully the evolution of a published article. We could share materials of our own work from original submission through to the final published article: raw data, first-cycle coding reports and data matrices, major drafts, rejection/revision letters from editors, revised manuscripts, etc. These process documents can be used to expose students to the evolution of themes from first-cycle coding through to the final, polished presentation.

Because they expose students to the process, these kinds of materials are every bit as essential in qualitative methods classes as are handbooks, methods articles, and exemplars of good research. Students can learn much about persistence and realistic expectations. Moreover, they may benefit from seeing the transformation of drafts over time; specifically how a spark of an idea can be transformed with crisper engagement with theory, a return to data, and a redefining of themes.

Privileging process over product also requires that we abandon the deeply entrenched practice of requiring and evaluating student performance based on a deductively written paper. Instead, we must cultivate and evaluate students' mastery of qualitative methods and analysis based on their inquiry processes. Alternatives for process assignments include having students submit open coding of transcripts, copies of codebooks, theoretical memos, data matrices, and other kinds of preliminary displays; short writing assignments where they compare and contrast preliminary findings via two different theoretical positions; or personal research journals that capture and reflect on their own process. Also, we might assign students to deliver informal "show and tell" presentations of their process instead of a formal paper as a final product. In this presentation students can be exposed to one another's analytical strategies and be called upon to describe and justify their choices. While students may not have a course paper that can be submitted to a conference, the tradeoff will be a better grasp of the way qualitative research is practiced.

Third, to emphasize both the technique and the artistry of good qualitative analysis, we need to devote more time to both. This means that we have to emphasize practice and repetition of technique in our courses, from the basics of coding, to memoing, to building data matrices, to experimenting with different qualitative data analysis software programs. A number of excellent books provide possibilities to guide technique development. For example, Tracy (2013) includes *Research Notepads* throughout her text, which features samples of her own and others' "technical" work, including visual displays, codebook excerpts, and data displays and matrices. Miles et al. (2014) provide a comprehensive sourcebook of coding and data display techniques. This go-to manual includes, for instance, 16 different kinds of first-cycle codes, detailed explanations of strategies for process coding, and advice on analytic memoing. But it is not enough to assign these readings. We need to carve out time in class for students to practice these techniques with

guidance and feedback. We also must encourage students to continue technique development and innovation through incremental assignments completed outside of class time.

In order to maximize the benefit of technique development, it is essential that all students work from the same, manageably-sized dataset. The benefits of working from a shared dataset more than compensate for the possible dip in intrinsic interest generated by using a personal one. A shared dataset can be vetted by the professor ahead of time to ensure that there is enough (but not too much) material from which good analysis can be drawn. Students can acquaint themselves with the data by the first week of class and continue to deepen their familiarity over the course of the semester, which will improve their ability to glean insights. Sharing the same dataset will allow students to help each other in more meaningful ways as they practice their skills. Importantly, this approach allows the professor and peers to reference the same material, enhancing the likelihood for better critique and stronger analyses—which would be next to impossible if they had no knowledge of each other's materials.

As competence is developed in some of the basic techniques, students also can begin exploring the *artistry* of qualitative analysis. The artistry of qualitative analysis comes from a combination of mastery and experimentation with technique, deep familiarity with data, constant reflexivity, seeking and responding to critique, and writing and rewriting. For this element of the curriculum, we recommend a studio-style classroom. In this model of instruction, students would engage in rounds of analysis development that offer opportunities for critique and revision. Early in the semester, students could share and compare their coding of and emerging thoughts about an interview to see where they converged and diverged in their analyses. As the semester moved on, students could present analytic progress reports. In the spirit of collegiality and learning, the relative merits of their analyses could be judged in comparison with others in the class. This would underscore the dual notion that, first, their goal is not to identify *the* right interpretation, but to identify *a* compelling interpretation. Students ideally would learn that there are multiple ways of understanding the data (e.g., different interpretations can be made depending upon what theoretical and existential lenses are chosen). Second, students would see that not all analyses are created equal. That is, some of the analyses will demonstrate more "rich rigor," "resonance," and "aesthetic merit" than others (see Tracy, 2013).

The studio-style classroom will allow students to explore qualities that distinguish acceptable analyses from truly great ones. They can ask and answer questions of each other: Which analysis is most novel? Which is the most insightful? Which demonstrates the most humanity and sensitivity to otherness? Which offers the greatest contribution to theory building? And because they used the same data, it will be apparent that the difference is attributed to the quality of analysis and theoretical immersion, not something inherent in the raw material with which they are working.

Finally, to guide students in moving from analysis to synthesis, we need to find constructive ways to encourage students to draw connections. As synthesis is often the most difficult challenge qualitative researchers face, this likely will be the biggest pedagogical challenge as well. There are sources that provide starting points for conversations about synthesis. For instance, Maxwell (2013) describes differences between categorizing techniques that fragment data and contiguity techniques that connect data. The process of connecting attempts to understand data in context and to identify relationships that connect parts of the data into a coherent whole. We also can lead discussions on the synthesizing strategies used in published qualitative studies. Students can be assigned different articles and asked to identify the synthesizing approach in it (e.g., theory, context, personal resonance, practical application, political motivation, communicative processes, discourses). Moving from discussion to practice, we could hold early-intervention data sessions with students. In contrast to member-checking style data sessions (which look more like final presentations and which implicitly encourage approval or very minor modifications), early-intervention sessions can be designed and used as an exploratory practice for (re)shaping preliminary findings. In an ideal session a researcher would provide an overview of the research questions, a brief description of data collection, and a formal presentation of first-cycle themes, including conceptual definitions and exemplars. Attendees (theoretical/topical experts, experienced qualitative researchers, etc.) would ask the researcher questions to help guide synthesis, including questions about theory, context, and connections within and across the data. Instead of telling novice researchers how to analyze their data, attendees will coach them in the slow, messy, technical, and artistic process of dividing and recombining their data in ways that move beyond first-cycle themes.

Conclusion

Good qualitative research moves beyond basic, descriptive first-cycle themes. But challenges remain regarding pedagogical practices that can achieve this aim without exacerbating problems of limited time and other resources of faculty. We hope that our exploration of these harmful habits and accompanying suggestions provide hope and optimism that these challenges can be overcome. Indeed, one of the most important lessons we need to share with students and disciplinary peers is that qualitative research is a time-intensive practice that demands thoughtful attention to process, embodies both technique and artistry, and requires sophisticated analysis and synthesis. Students need an appreciation of the investment that is necessary to produce this type of high quality work. Doing so will not only benefit our students, but ideally also will enhance the perception and quality of qualitative research throughout the discipline.

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