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Course Information:
Time: 2:30 pm - 5:30 pm Thursdays
Dates: September 26 – December 6, 2012
Location: Rubloff 6th Floor, Shedd Conference Room
Minimum enrollment: 4
Maximum enrollment: 10
Units: 1.0 credit
Grades due: December 16

This course is an elective for all students in the Masters of Science in Health Services and Outcomes Research. Open to other graduate students with permission from the Course Director.

Prerequisites: Students must have a Bachelor’s degree and be enrolled in a Master’s level program. Students will be given a dataset to work with for the analysis portion of the course. Dr. Gordon will have a dataset available to use. As students will come to experience through this process, being immersed in a qualitative dataset continuously over time is essential to having a strong grip on the codes, their multiple meanings, and interpretations. As an understanding of context is crucial for qualitative research, focusing on one topic will facilitate the learning process.
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<td>Assessing the Quality of Qualitative Research Using qualitative data to inform public policy</td>
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I. Course Description:
Qualitative methods are often used to develop and test questionnaires, assess the usability of interventions, and evaluate outcomes of health policies. This course will prepare researchers to interpret the meaning of events from the participant’s point of view, using multiple methods. In this era of patient-centered care, such insights are invaluable for understanding patients’ and providers’ experiences with access to care, use of services, and factors contributing to health outcomes; developing interventions; and informing health policies. This course will provide the necessary background and applied training in qualitative methods for health services research. The course is structured such that the first several weeks are devoted to methods, then the next couple of weeks focus on analysis, and the final weeks cover writing methods.

This course will provide practical knowledge and skills in qualitative research methods and analytic approaches often used in health services research including in-depth and semi-structured interviews, focus groups, and participant observation. Students will learn a variety of qualitative data analysis strategies, how to use qualitative data analysis software, and how to obtain inter-coder reliability. Students will gain hands-on experience with data analysis including: data management, transcription, coding, and synthesizing qualitative data. Students will also gain skills in the presentation and communication of qualitative data through writing up their study methods and results to prepare high quality manuscripts and grant applications. Additionally, students will gain an appreciation for: how qualitative data can dovetail with quantitative data to provide richer insights into phenomena, the variety of validity strategies, and how qualitative data can contribute to health policy. Students will gain hands-on experience developing qualitative data collection instruments and conducting qualitative research methods to hone new skills. Through class participation, reading assignments, developing data collection instruments, and practicing data collection methods, and critiquing each other’s instruments and analyses, students will gain the necessary skills to prepare and conduct, as well as write grant proposal involving, qualitative research methods and analysis in health services research.

III. Course Objectives
By taking this course, students will:
1. Gain knowledge of the range of qualitative research methods and their value for health services research.
2. Determine when qualitative methods are warranted and appropriate sample sizes.
3. Determine which qualitative method(s) to use for a given research question.
4. Acquire the skills to effectively conduct and critique qualitative methods.
5. Gain knowledge about qualitative data analysis approaches.
6. Acquire the skills to effectively conduct qualitative data analysis.
7. Acquire skills to use qualitative data analysis computer software.
8. Write the methods, analysis, and results sections for a manuscript based on a qualitative study.
9. Appreciate how to use of qualitative data to inform health policy.
10. Evaluate the rigor of qualitative research.
IV. Course workload
3 hours of classroom-based instruction per week consisting of:

- **Lecture:** Approximately 60 minutes of lecture from Dr. Gordon and/or guest lecturers. The time spent on the lecture will fluctuate each week depending on the nature of the In-Class Exercises.

- **Class Discussion:** 30-60 minutes of class discussion.
  
  o In weeks 2, 3, 4, 9, 11 one student will be required to facilitate a class discussion based on an assigned reading related to the topic of the week (all students are expected to read the assigned articles). We will critique the advantages and disadvantages of the methodology or analytic approach discussed in the assigned reading(s) as well as the relationship between qualitative methods and health services research.

- **In-Class Exercises:** 60-90 minutes of In-Class Exercises. For several classes, students will engage in hands-on methods development and qualitative data analysis skill-building activities. For a schedule of each In-Class Exercise, refer to the week-by-week schedule below.

- **Questions:** Students are expected to come to each class prepared with 1-2 questions about the conduct of the methodology under discussion.

Students should expect to spend approximately 6 hours per week outside of class on readings and homework assignments. Students are expected to read all assigned readings prior to class. Since the number of assigned readings has been greatly reduced from prior years, students are strongly encouraged to review the optional readings to enrich their understanding of each topic.
V. Grading policy

- **10% Class Participation** (based on attendance, quality of weekly discussion). Students are expected to attend every class. **If you miss 1 class, you are expected to propose to Dr. Gordon within 1 week before missing the class, a way to make up the missed work.** Two absences will result in a lower grade or an ‘incomplete.’ In order to pass the course, students with more than two absences should propose and complete a suitable (at the discretion of the course director) learning activity to restore their grade. **If you expect to miss two or more classes, it is highly recommended that you not enroll in the course.**

- **5% (each) Weeks 2, 4, 12: Article Presentation in class.** Students will independently find a health services research peer-reviewed article and present it to the class to highlight the use, value, and benefit of the specific qualitative method (being discussed that week) to health services research. Bring in one hardcopy of the article to show the class. [Due Weeks 2, 4, 12] For week 12 – articles should be about the use of an innovative qualitative method.

- **10% Week 3: Develop Interview Guide:** Develop and submit one of the following options: an interview guide or a focus group interview guide. The guide should be 2 to 3 pages in length. Do not include demographic survey questions. Be sure to include probes, as needed. Bring in enough copies for all students in the class to review. [Due Week 3]

- **10% Week 3: Mock Interview in class:** Students will practice doing a 5-8 minute mock interview/focus group in class and be critiqued by the class. Students will be assigned to interview each other. The mock interview should be based on a segment of the student’s interview guide or focus group interview guide being turned in today. The grade will be based on the quality of the interview process. [Due Week 3] (If needed, we will continue in Week 4).

- **5% Week 4: Coding Practice in class:** Students will practice coding the segments of text provided by Dr. Gordon (e.g., the responses to 1 question across cases). The codes to be critiqued by the class. [Due Week 4]

- **10% Week 9: Field Notes:** Conduct an observation of the student’s site of research interest or a public space and prepare 1 page of field notes. Each student’s field notes will be reviewed and critiqued in class for the purpose of illustrating how to interpret and deconstruct meanings from the observed data. Bring copies for all class members. [Due Week 9]

- **5% Week 9: Metaphors, Idioms, Expressions:** Present a metaphor, idiom, expression, or joke that emerged from the student’s research and discuss its meaning in relation to the student’s topic. Also discuss how the student realized its meaning. [Due Week 9]

- **10% Week 11: Write Methods & Analysis Sections:** Develop and submit the Methods & Analysis sections of the manuscript (typically presented at the end of the methods section). The grade will be based on the thoroughness of the methods and the accuracy of description of analysis. The Methods section (which contains the analysis) of publications is typically between 1-5 paragraphs; the Analysis section should be ~1 paragraph. Bring copies both sections for each student to review. Students will critique each other’s sections by highlighting the strengths and weaknesses, and suggesting ways to improve. [Due Week 11].
• 5% Week 11: Informing Policy & Practice. Students will discuss how their own qualitative studies will inform public policy or clinical practice. [Due Week 11]

• 5% Week 12: Conceptual Model Exercise. Students will work with other students in small groups to assess how qualitative findings (provided) apply to a conceptual model (provided) and give a brief presentation. [Due Week 12]

• 25% Week 12: Final Project: Students will be required to choose and complete one of the following projects to fulfill this requirement. [Due Week 12, TUESDAY, December 10, 2013, via email] Students need to meet with the course director no later than Week 3 to discuss the project and obtain approval. The final project should be of publication quality.
  o (preferred) Write the Introduction, Methods, and Analysis sections of a manuscript for a peer-reviewed journal based on the student’s qualitative methods research project. Additionally, the Results section should be provided in outline form with sample illustrative quotations and introduction to the quotations. Should be 5-10 double spaced pages (12 pt font, Ariel font, 1 inch margins).
  o Write the Introduction, Methods, and Analysis sections of a systematic review of qualitative research on a given topic relevant to health services research. Should be 5-10 double spaced pages (12 pt font, Ariel font, 1 inch margins).
  o Write a brief editorial or review article (e.g., 1,000-2,000 words) on the need for or value of qualitative methods for a specific research topic that can be targeted to a journal such as Health Affairs (narrative matters section), Health Services Research (Editorial), etc…

V. Course materials
Selected readings: Each week students will be expected to read ~ 3 articles. Reading assignments are available on the Course Management System (“Blackboard”).

VI. Course Evaluation
The Graduate School Program administers web-based course evaluations to students for each course near the end of the quarter. Your completion of both the Unit (course) and Faculty evaluations is required; failure to complete the evaluations will result in an incomplete grade until the evaluations are submitted. You will be sent the web-link and instructions via e-mail later in the quarter. You will have several weeks to complete the evaluations before grades are submitted. Your evaluation of the course and faculty is anonymous; your identity cannot be linked with your responses.
Week 1: September 26, 2013. General Overview & Philosophical Foundation of Qualitative Methods

Class Objectives: Students will be able to:
- Articulate the advantages of using qualitative methods
- Describe the theoretical foundations and paradigms of qualitative research methods
- Describe how to engage in self-reflection and why it is valuable for qualitative research

Required Reading:


Optional Reading:
Tripp-Reimer, Doebbeling B. Qualitative Perspectives in Translational Research. Worldviews on Evidence-Based Nursing 2004;1(S1)S65-S72. (Health in general, not HSR per se)
*This reviews how qualitative research has been used in health-related research.
**Week 2: October 3, 2013. Interviewing & Sample Size & Transcribing**

Class Objectives: Students will be able to:
- Distinguish between unstructured, in-depth; semi-structured; and structured interviews
- Articulate the purpose of cognitive interviews
- Articulate 10 strategies for the effective conduct of unstructured or semi-structured interviews
- Articulate 3 strategies for establishing rapport
- Determine appropriate sample sizes for qualitative research
- Describe how to transcribe audio-recordings
- Strategize on best approaches for transcribing and translating non-English text-based data collected from non-English speaking respondents

**Required Reading:**


Morse J. Determining Sample Size. *Qualitative Health Research* 2000;10(1):3-5. **This is a must read & super short!**

**Optional Reading:**

Week 3: October 10, 2013. Focus Groups & Data Management

Class Objectives: Students will be able to:
- Define what focus groups are and when they are warranted
- Distinguish the uses of focus group data from interview data
- Articulate 5 strategies for the effective conduct of focus groups
- List 3 criteria for determining whether focus groups were effective /effectively conducted
- Identify steps for organizing and managing qualitative data files

Required Reading:


Optional Reading:


In-Class Exercise: Transcribing Demonstration. Dr. Gordon will demonstrate how to use a transcription machine. Students will be offered the opportunity to try it out.
Week 4: October 17, 2013. Observational Research & Introduction to Qualitative Data Analysis & Coding

Class Objectives: Students will be able to:
- Describe 3 techniques to facilitate a smooth entry into the field site
- Describe the purpose of and effective approaches to conducting participant observation
- Identify approaches for writing field notes
- Define key approaches to qualitative data analysis
- Articulate how to code data
- Differentiate between parent and child codes

Required Reading:
*Although there are 4 lengthy readings assigned for this week, keep in mind that a) they are all worthwhile, and b) there is no class next week. So, if needed, complete the reading of Bernard & Ryan by the end of next week, when we start to get in the thick of the analysis phase of our course.


*Bernard HR, Ryan GW. Text analysis: Qualitative and Quantitative Methods. In Handbook of Methods in Cultural Anthropology. Bernard HR, ed. Walnut Creek, CA: Altamira Press, 1998, pp. 595-646. [***This is a good overview of everything.]

Optional Reading:
Coles GA. Using Failure Mode Effects and Criticality Analysis for High-Risk Processes at Three Community Hospitals. Joint Commission Journal on Quality and Patient Safety. 2005;31(3):132-140. [***This is a good example]


In-Class Exercise (Required): Coding practice of interview text segments provided by Dr. Gordon.
Thursday, October 24: No Class.
Week 5. October 31, 2013. Introduction to Qualitative Data Analysis & Coding, cont. & Inter-Coder Agreement

Class Objectives: Students will be able to:
- Describe the iterative nature of qualitative analysis
- Define inter-coder agreement
- Calculate inter-coder agreement

Required Reading:

*Read only pages 55-65.


In-Class Exercise (Required):
Conducting inter-coder analysis: conduct inter-coder analysis on segments of text provided to students by the instructor.
**Week 6: May 10, 2013. Grounded Theory, Content Analysis, Constant Comparative Approach**  
**Thematic Analysis, Semantic Analysis, Metaphoric Analysis**

Class Objectives: Students will be able to:
- Compare the advantages and disadvantages of different qualitative data analytic approaches
- Describe how to conduct content and thematic analysis
- Describe how to conduct semantic analysis
- Determine how to combine inductive and deductive approaches to qualitative analysis
- Describe the constant comparative method for data analysis

**Required Reading:**  


Bradley EH, Curry LA, Devers KJ. Qualitative data analysis for health services research: developing taxonomy, themes, and theory. *Health Serv Res*. Aug 2007;42(4):1758-1772. [***a must read!***]

**Optional Reading:**  


**In-Class Exercise:** More coding practice
Week 7. November 14, 2013. Use of Qualitative Data Analysis Computer Software

Class Objectives: Students will be able to:
- Identify different types of software programs for analyzing qualitative data
- Articulate the advantages and limitations of using software for qualitative data analysis
- Describe how to use a software program to analyze qualitative data
- Code data using a qualitative data analysis computer software program.

Required Reading:


Optional Reading:


In-Class Exercise (Required): In-class demonstration of computer software of coding and using a qualitative analysis software program (performed by guest lecturer).
Week 8: November 21, 2013. Writing Qualitative Methods and Analysis & Reporting Results & Quotes

Class Objectives: Students will be able to:
- Write the methods and analyses sections in research reports
- Articulate approaches for reporting results and using and introducing quotations
- Determine whether qualitative findings support a theoretical/conceptual model

**Required Reading:**


**Optional Reading:**

**In-Class Exercise (Required):**
Students will need to come to class prepared to share an example from their research of either a meaningful metaphor, word, phrase, idiom, or even a poignant joke that was used by their respondents (that reflects an important perspective or theme from their study). Students should explain what that expression means in the context of their study. If students absolutely cannot find one, they should do a pubmed search. There are many articles on this topic with examples.
Thursday, November 28: No Class - Thanksgiving.
Week 9: December 6, 2013. Assessing the Rigor of Qualitative Research & Influencing Public Policy  

Class Objectives: Students will be able to:
- Identify criteria used to evaluate the rigor of qualitative research
- Compare different approaches used to assess validity (or credibility) between qualitative and quantitative methods
- Identify avenues to inform public policy using qualitative research findings

Required Reading:


Optional Reading:
[***This checklist should be consulted in order to be sure that you’ve included necessary elements in the write up of your qualitative paper.]


In-Class Exercise (Required):
- Analyze each student’s methods & analysis sections.
- In a separate discussion, students will discuss the policy implications of their own research.
Week 10: December 13, 2013. Innovative Forms of Qualitative Research & Ethical Issues in Qualitative Research.

Class Objectives: Students will be able to:

- Describe novel forms of qualitative methods
- Consider how novel forms of qualitative methods could apply to health services research
- Articulate political and ethical concerns with conducting ethnographic research & how best to address them
- Determine whether qualitative findings support a theoretical/conceptual model

**Required:**


**Optional Reading:**


**In-Class Exercise:** Present an example of an article found on a novel form of qualitative methods, e.g., photovoice, diary studies, mobile methods.

**In-Class Exercise (Required):** As a group, the students will work together to review study results to determine how the findings apply to a theoretical/conceptual model, provided by the instructor (in advance). Students will be placed into small groups to work together to layer data elements onto the diagram to determine how well the study results map onto the theoretical/conceptual model. Do the results support the theory? Is the theory a good explanatory system for the results? Each group will give a brief presentation to the rest of the class after the exercise. By partaking in this exercise, students learn how to think strategically about their own results and determine whether their findings can be linked to their theory. This information will be critical for writing the interpretation of results in the Discussion section of students’ manuscripts.
VIII. ACADEMIC INTEGRITY

Academic integrity is fundamental to every facet of the scholarly process and is expected of every student in The Graduate School (TGS) in all academic undertakings. Integrity involves firm adherence to academic honesty and to ethical conduct consistent with values based on standards that respect the intellectual efforts of both oneself and others.

Ensuring integrity in academic work is a joint enterprise involving both faculty and students. Among the most important goals of graduate education are maintaining an environment of academic integrity and instilling in students a lifelong commitment to the academic honesty that is fundamental to good scholarship. These goals are best achieved as a result of effective dialogue between students and faculty mentors regarding academic integrity and by the examples of members of the academic community whose intellectual accomplishments demonstrate sensitivity to the nuances of ethical conduct in scholarly work.

Standards of academic integrity are violated when a student engages in actions including:

* cheating in the classroom or on examinations, including master's final examinations and Ph.D. qualifying examinations;
* the intentional and deliberate misuse of data in order to draw conclusions that may not be warranted by the evidence;
* fabrication of data;
* omission or concealment of conflicting data for the purpose of misleading other scholars;
* use of another's words, ideas, or creative productions without citation in either the text or in footnotes;
* paraphrasing or summarizing another's material in such a way as to misrepresent the author's intentions;
* and use of privileged material or unpublished work without permission.

Academic dishonesty is a serious matter for graduate students committed to intellectual pursuits, and will be adjudicated in accordance with procedures approved by the Graduate Faculty.

http://www.tgs.northwestern.edu/academics/academic-services/integrity/index.html
USEFUL RESOURCES:

NIH e-source:
http://www.esourceresearch.org/
Welcome to the OBSSR e-Source online resource for Behavioral and Social Sciences Research. In this digital anthology you will find a series of chapters covering a wide range of topics related to BSS research design and implementation.

Methodspace:
What this space is. Methodspace is a multidimensional online network for the community of researchers, from students to professors, engaged in research methods. Sponsored by SAGE, a leading publisher of books and journals in research methods, the site is created for students and researchers to network and share research, resources and debates. Methodspace users have free access to selected journal articles, book chapters, etc which highlight emerging topics in the field.
http://www.methodspace.com/page/about-this-space

Weft QDA is an easy-to-use tool to assist in the analysis of textual data such as interview transcripts, written texts and fieldnotes. It includes a number of fairly standard CAQDAS features (follow links to see screenshots):
http://www.pressure.to/qda/

NSF.

DIRT: Digital Research Tools Kit (reviews a bunch of software programs)
https://digitalresearchtools.pbworks.com/w/page/17801694/Perform%20Qualitative%20Data%20Analysis

Excellent summary of qualitative methods, analysis, etc.
http://www.cedu.niu.edu/~sorensen/502/powerpoint/topicD/qlnotes.htm

Journals:
See the following URL for an extensive list of many journals receptive to publishing qualitative research:
http://www.slu.edu/organizations/qrc/QRjournals.html
MORE OPTIONAL READINGS:

Qualitative Methods - Overview
Weiner BJ, Amick HR, Lund JL, Lee SYUD, Hoff TJ. Use of Qualitative Methods in Published Health Services and Management Research: A 10-Year Review. Medical Care Research and Review 2011;68(1) 3–33. *This provides an overview of the use of qualitative methods in HSR


Malterud K. Qualitative research: standards, challenges, and guidelines. Lancet. 2001;358(9280):483-8. *example of an article published in a medical journal that promotes the use of qualitative research

Interviewing & Sample Size


**Focus Groups**


**Observational Research**


**Case Studies**


Yin RK. Enhancing the quality of case studies in health services research. HSR: Health Services Research 1999;34(5 Part II):1209-1224.


**Implementation, Evaluation, & Policy Research**


*This is a good example.

**Mixed Methods**


Curry LA, Nembohar ID, Bradley EH. Qualitative Research and Mixed Methods Provide Unique Contributions to Outcomes. *Circulation* 2009;119;1442-1452.


**Mobile Methods**


**Photovoice**

**Innovative methods**
Leech, NL; Onwuegbuzie AJ. Qualitative data analysis: A compendium of techniques and a framework for selection for school psychology research and beyond. *School Psychology Quarterly* 2008;23(4):587-604.

**Validity and Reliability**


**Systematic Reviews & Appraising the Quality of Qualitative Research**


O’Connor et al., Systematic Review website: 
http://www.ebbp.org/course_outlines/systematic_review/#CA

* This is a good example.

Watch video:  
School of Nursing and Academic Division of Midwifery, University of Nottingham 2005  
http://intralibrary.rlo-celt.ac.uk:8080/intralibrary/open_virtual_file_path/i1967n7942t/systematic_reviews/2.html

Hanson JL, Balmer DF, Giardino AP. Qualitative research methods for medical educators. Academic Pediatr 2011;11(5):375-86.  *This is a nice overall introduction and description of key points for entire course.

Data Management
*Read only pages 50-55.

Transcription

Roter, D. The Roter Method of Interaction Process Analysis. The Johns Hopkins University, School of Hygiene and Public Health, Department of Health Policy and Management. 1997

Qualitative Analysis & Coding
*This is an audio-taped discussion of a coding session where members of the research team negotiate their interpretations of the text aloud and determine whether to apply specific codes to segments of text.


*Good examples based on the work by the Guest Speaker:

Papadimitriou C. 'It was hard but you did it': the co-production of 'work' in a clinical setting among spinal cord injured adults and their physical therapists. *Disability & Rehabilitation* 2008; 30(5):365 – 374.


*Narrative analysis is another analytic approach, not discussed in this class.

**Metaphor Analysis**


**Writing Qualitative Data**


**Using Qualitative Data to Inform Public Policy**


*Discusses meta-analysis – synthesizing qual research for policy makers (implications of data for policy)
Qualitative Data Analysis Software
Hahn, Christopher. Doing Qualitative Research Using Your Computer: A Practical Guide.
*This gives examples of using XL and Access also.

Bozelay, Pat. NVivo. Good text on using NVivo.

Ethical Issues:

Panel on Research Ethics

TCPS 2 - Chapter 10