


Story Finding/Story Telling: Using Qualitative Methods to Measure What, How, and Why

If we could first know *where* we are, and
whither we are tending, we could better
judge *what* to do, and *how* to do it.
— Abraham Lincoln

Kamella Tate, MFA, EdD
Artcentricities.com
@kamellatate
LACountyArts.org
@LACountyArts



Today

- **Quick review**
 - Assessment and evaluation
 - **Why and what**
- **Qualitative inquiry**
 - The **QUAL** perspective
 - **What**
 - **Why**
 - **When**
 - **QUAL** in practice
 - **How**
 - **Analysis and synthesis**
 - *Writing up and reporting*
 - *Representation and display*

LACAC 2015 Kamella Tate, MFA, EdD

Quick Review

Purposes



- **Documentation:** The **story** of our organization, program, project . . .
 - What's **happening**? What's going on, how **much**, what **kinds**? **Who** are we, what do we **do**, **how** do we do it, who do we **serve**?
- **Learning, planning, and improvement: Practice-based evidence** for **quality** and **performance management**.
 - How can we get **better**? How can we be **nimble** and **innovative**?
- **Effectiveness:** Strategies and activities. **Outputs** and **outcomes**.
 - What's **working**? What's **not working**? **Why/why not**?
- **Advocacy:** Find the **case**. Make the **case**.
 - How do we demonstrate **merit, worth, and significance**?

LACAC 2015

Kamella Tate, MFA, EdD

Quick Review

What we mean by . . .




Assessment

Assessment is the **organized and ongoing process** of **collecting and analyzing** data and information

so as to **describe** activities, practices, progress, and other dimensions of performance.

LACAC 2015

Kamella Tate, MFA, EdD




Quick Review
What we mean by . . .

Assessment

What's happening?

LACAC 2015 Kamella Tate, MFA, EdD



Quick Review
What we mean by . . .

Evaluation
Systematic investigations of the **merit** (i.e., quality, excellence), **worth** (i.e., value, cost-effectiveness), and/or **significance** of a project (i.e., impact, importance).

Scriven, M. (1998). Minimalist theory of evaluation: The least theory that practice requires. *American Journal of Evaluation*. 19(1), 57-70.

LACAC 2015 Kamella Tate, MFA, EdD

Quick Review



What we mean by . . .

Evaluation

Did it work/not? How well? Why? How?

LACAC 2015

Kamella Tate, MFA, EdD

Quick Review



Data & Methods

It was a great step in science when men became convinced that in order to understand the nature of things, they must begin by asking not whether a thing is *good* or *bad*, *noxious* or *beneficial*, but of **what kind** it is?

And **how much** is there of it?

Quality and **Quantity** were then first recognized as the primary features to be observed in **scientific inquiry**.

— James Clerk Maxwell
Address to the Mathematical and Physical Sections of the British Association, Liverpool, 15 Sep 1870
The Scientific Papers of James Clerk Maxwell (1890 edition, reprint 2003), Vol. 2, 217

LACAC 2015

Kamella Tate, MFA, EdD



Where there are **numbers**, we also need **words**.

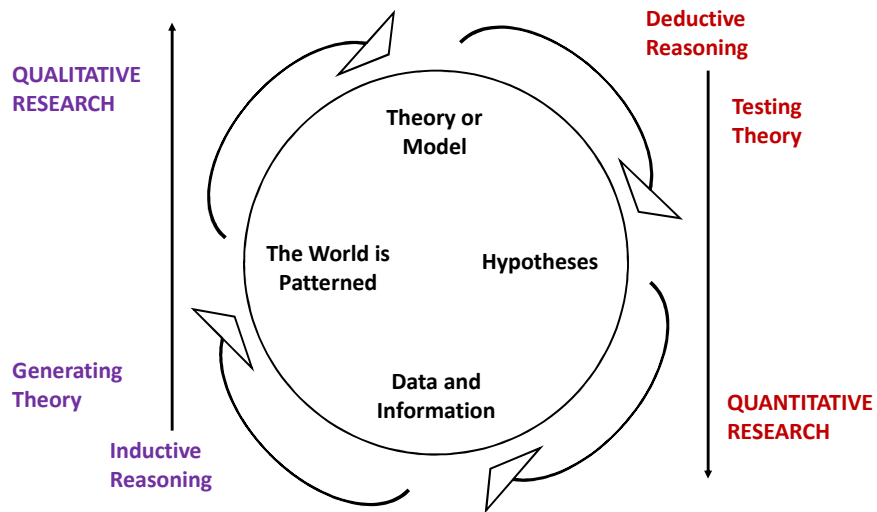
Where there are **words**, we also need **numbers**.

LACAC 2015

Kamella Tate, MFA, EdD



The Wheel of Research



LACAC 2015

Kamella Tate, MFA, EdD



Deductive logic or reasoning:

Theory → Evidence

Inductive logic or reasoning:

Evidence → Theory



Myth #1

Quantitative methods are **more scientific**
and/or more rigorous than qualitative methods.

Myth #2

Qualitative methods are **easier** than
quantitative methods.



Quick Review

An evaluation workplan

1. **What** are you evaluating?
2. What will it **look like** if you're successful?
3. **Data:** What **information**, what **evidence** – will you collect answer your questions?
4. **Methods:** From **whom** and **how** and **when** are you going to collect the data?
5. **Analysis/Synthesis:** What are you going to **do** with the data?
6. **Writing up and reporting** your findings

LACAC 2015

Kamella Tate, MFA, EdD



Qualitative Inquiry

The **QUAL** perspective

What
Why
When

LACAC 2015

Kamella Tate, MFA, EdD



What?

Qualitative (data, methods, designs)

Qualitative data is evidence largely in the form of **words** and **texts**.

- Quotes, narratives, and stories
- Descriptions of environments, events, people, etc.
- Things that “work” like texts such as images, media, artworks, places, etc.

LACAC 2015

Kamella Tate, MFA, EdD



What?

In contrast with quantitative research, qualitative studies usually do not involve ***a priori* hypotheses** or the measurement of ***quantified variables***.

- Qualitative researchers seek to **describe, interpret,** and **understand** phenomena in a **holistic framework**. **NO MANIPULATION.**

Not opinion, belief (religious or otherwise), **hunch, received wisdom, guess, tradition, suspicion, gut feeling, etc.**

LACAC 2015

Kamella Tate, MFA, EdD



Why?

- Qualitative methods are particularly useful for answering/exploring **What**, **how**, and **why** questions.
 - **What: Descriptive** (also QUANT, e.g. % or # of . . .)
 - What **happened** during our OGP-funded project?
 - What was it **like** to participate in the Spotlight program?
 - **How and Why: Process and mechanism**
 - **Why** are people coming to our program?
 - **How** did we **implement** our outreach strategies?

LACAC 2015

Kamella Tate, MFA, EdD



Tool: Why/When – Patton's 20 Questions Activity Packet p. 1

LACAC 2015

Kamella Tate, MFA, EdD



When you need/want to . . .

- To develop an **initial understanding** of an issue or problem when theory is **weak** or **non-existent**
- Explore a **range of ideas and feelings** people have about an event, experience, policy, etc.
- Understand **different perspectives** and **uncover underlying motivations**
- Provide information needed to **design a quantitative study**
- **Explain findings** from a quantitative study

LACAC 2015

Kamella Tate, MFA, EdD



Activity 1: Self-Test

Activity Packet p. 3

LACAC 2015

Kamella Tate, MFA, EdD



Qualitative Inquiry

QUAL in practice
How

LACAC 2015

Kamella Tate, MFA, EdD



Qualitative Inquiry

Strategic Themes

(Patton, 2002, pp. 40-41)

- **Design Strategies (1-3)**
- **Data Collection and Fieldwork Strategies (4-7)**
- **Analysis Strategies (5-12)**

LACAC 2015

Kamella Tate, MFA, EdD



How?

Design Strategies

(Patton, 2002, pp. 40-41)

1. Naturalistic inquiry

- **Real-world** situations; **no manipulation**; **openness** to experience.

2. Emergent design flexibility

- **Adaptive**, nimble, elastic; **resists rigidity**, embraces **responsiveness**.

LACAC 2015

Kamella Tate, MFA, EdD



How?

Design Strategies

(Patton, 2002, pp. 40-41)

3. Purposeful sampling

- **Information rich cases** (individuals, events, phenomena, experiences, etc.) are selected as being illustrative and illuminative.
- **Seeks deep and focused insight** versus broad and encompassing explanation.

LACAC 2015

Kamella Tate, MFA, EdD



How?

Design Strategies

(Patton, 2002, pp. 40-41)

No formula exists to determine sample size in qualitative research.

- Trade-offs between **depth** (fewer cases) and **breadth** (more cases).
- Limitations of **time** and **money**.

LACAC 2015

Kamella Tate, MFA, EdD



How?

Design Strategies

(Patton, 2002, pp. 40-41)

Whatever the strategy, a **rationale** is needed!

- Determine the sample size and scope **in advance**.
- **Emergent** sampling design; start out and add to the sample as fieldwork progresses.
- Sample to the point of **redundancy** (not learning anything new).
 - **SATURATION**

LACAC 2015

Kamella Tate, MFA, EdD



Tool: Purposeful Sampling Strategies Activity Packet p. 4

LACAC 2015

Kamella Tate, MFA, EdD



How? Data Collection & Fieldwork Strategies

(Patton, 2002, pp. 40-41)

4. Qualitative Data

- **In-depth:** Interviews, observations, documents, artifacts

	Oral Interviews	Observations	Written or Oral Questionnaires
Collecting Qualitative Data	Un- or Semi-structured Interviews Focus groups	Observational fieldwork Extant documents and artifacts	Open-ended written or oral questionnaires

LACAC 2015

Kamella Tate, MFA, EdD

Collecting Qualitative Data



Use measures such as these . . .

- EASIER
- ↓
- HARDER
- **Observations** (events, relationships, settings, participants, etc.)
 - **Document review** (press clippings, letters and emails, meeting minutes, memos, files, etc.)
 - **Artifact review** (artworks, artmaking materials, historical influences, etc.)
 - **Short-answer** survey items
 - **Interviews** (in-person, phone, email, etc.)
 - **Focus groups** (patrons, board, staff, artists, etc.)

LACAC 2015

Kamella Tate, MFA, EdD

Collecting Qualitative Data



- **Observational fieldwork** **Tool: Activity Packet p. 5**
 - Multiple places, multiple times: People, settings, objects, contexts, processes, relationships, high/low points, celebrations, events, etc.
 - Descriptions of program or workplace activities; planning and management meetings; formal and informal interactions; routines, behaviors, conversations, official and unofficial places, etc.
- **Review/analysis of documents and artifacts**
 - Official and unofficial documents and records; work products; personnel assessments; grant proposals and reports; formal and informal correspondence and memos; publications, newsletters, media; journals, diaries, letters; artworks (literary and non-literary); photographs, videos, objects; emails and postings; etc.

LACAC 2015

Kamella Tate, MFA, EdD



Collecting Qualitative Data

- **Short-answer survey items; written or oral questionnaires**
 - Open-ended questions or “free comment” spaces often are included in instruments along with scaled surveys.
- **Interviews and focus groups**
 - Program participants, directors, constituents; board, staff, user groups; community members; civic and business leaders; etc.
 - Open-ended, un- or semi-structured, conversational; individuals; facilitated or self-directed focus groups/group interviews.

LACAC 2015

Kamella Tate, MFA, EdD



Building a Text for Analysis

Purpose of QUAL data collection is to **build an informational text** – a “**data corpus**” – that will be **analyzed** and **synthesized**.

LACAC 2015

Kamella Tate, MFA, EdD



Data Corpus

- Narrative **descriptions** of events, artifacts, artworks, environments, etc.
- Narrative **excerpts** from written materials
- **Images** and other **media**
- Patron/participant **comments** and **viewpoints**
- **Feedback** and **recommendations** from artists, staff, board members, patrons/participants
- Patron/participant **stories**, descriptions, extended observations, ideas

LACAC 2015

Kamella Tate, MFA, EdD



How?

Data Collection & Fieldwork Strategies

(Patton, 2002, pp. 40-41)

5. Personal Experience and Engagement

- **Close, direct contact**; the researcher's **personal experiences, background**, and **insights** are valid.

6. Dynamic systems

- The "case" is always developing; **change is constant**.

7. Empathic Neutrality and Mindfulness

- **"Vicarious understanding without judgment."**

LACAC 2015

Kamella Tate, MFA, EdD



How?

Analysis Strategies

(Patton, 2002, pp. 40-41)

8. Unique Case Orientation

- Analysis begins with the **true story of a unique case.**

9. Inductive Analysis and Creative Synthesis

- **Iterative immersion** and **imaginative reflection.**

10. Holistic Perspective

- The case is a **complex system** and **cannot be reduced.**

11. Context Sensitivity

- **“Naturalistic inquiry preserves natural context”** (p. 62).

12. Voice, Perspective, Reflexivity

- Researcher is **responsible for/critical of his/her “voice.”**

LACAC 2015

Kamella Tate, MFA, EdD



Activity 2: Self-Test

Activity Packet p. 6

LACAC 2015

Kamella Tate, MFA, EdD



Analyzing & Synthesizing Qualitative Data

- **Interpret** individual narratives to reveal **themes** and **patterns, composite portraits** and **promising practices, strengths** and **weaknesses, threats** and **opportunities**.
- Use stories, callouts, images, graphics, etc., to **describe** personal responses and outcomes and **illustrate meanings and models** that reflect what happened and what participants experienced.

LACAC 2015

Kamella Tate, MFA, EdD



Analyzing & Synthesizing

- **Goal:** To link **specific textual data** to concepts, constructs, categories, “essential themes,” descriptions, etc.
 - Some categories **precede** data collection
 - Based on constructs of interest, theory, literature
 - Others **emerge** from data itself
 - Unexpected observations, new insights

LACAC 2015

Kamella Tate, MFA, EdD



Analyzing & Synthesizing Step-by-Step

- Prepare and organize the data for analysis
- **Explore, segment, and code** the data
- Collapse codes into **clusters**
- Sort and organize clusters, develop **descriptions** and **derive/define themes**
- **Interpret** the findings
- **Data display: Represent** the findings
- **Validate** the credibility of the findings

LACAC 2015

Kamella Tate, MFA, EdD



What's a "code"?

- "Codes are **tags** or **labels** for assigning **units of meaning** to the descriptive or inferential information compiled during a study.

Codes are usually attached to 'chunks' of varying size – **words, phrases, sentences or whole paragraphs.**" (Miles & Huberman, 1994, p. 56)

LACAC 2015

Kamella Tate, MFA, EdD



Coding

Codes should stick closely to the data

- Preserve words/phrases of **3-5 words**
 - “really got emotional” not “feeling-full and resonant experience”
- Preserve **events**
 - A “show” not a “theatrical event”
- Portray **viewpoints**
 - “primary interest”
- Suggest **contexts**
 - “close-knit community”

LACAC 2015

Kamella Tate, MFA, EdD



What’s a “cluster”?

- After open coding an entire text, **make a list** of all code words and phrases
- **Cluster** together **related codes** and look for **redundancy** in words and/or content
 - **Collapse codes**
- **Objective: Reduce** the list of codes to a more manageable number
 - 5 or 15 or 25 or . . . ? depends on the data corpus

LACAC 2015

Kamella Tate, MFA, EdD



What's a "theme"?

- Themes represent **organized groups of codes and clusters** – *types, motifs, categories, frame, unifying ideas, structures, etc.*
- You can't classify something as a theme unless it cuts across the *preponderance* of the data!

LACAC 2015

Kamella Tate, MFA, EdD



Thematizing

- **Gather** your remaining codes and clusters
- **Assemble and organize them into groups** that reflect similar ideas, structures, needs, meanings, interests, etc.
 - Collapse and reduce, collapse and reduce, collapse and reduce . . .
- Create **theme names** that encompass the groups you're organizing

LACAC 2015

Kamella Tate, MFA, EdD



Types of Themes

- **Ordinary:** Expected
- **Unexpected:** Surprise!
- **Hard-to-classify:** Not fitting readily into clusters; don't really match emerging categories
- **Major themes** represent the "big ideas"
- **Minor themes/sub-themes** represent secondary, but still related ideas
 - Minor themes can be included under major themes in a report

LACAC 2015

Kamella Tate, MFA, EdD



Naming Codes & Themes

Names can come from several sources

- **The data corpus:** Participants' actual words, text from documents/artifacts, etc.
- **The researcher:** Terms, concepts, categories, etc., that reflect what s/he sees in the data and/or evaluation questions
- **The literature:** Constructs, phenomenon, models, concepts, theories, etc.

LACAC 2015

Kamella Tate, MFA, EdD



Your Turn!

DIY QUAL Data Analysis

Case Brief: ArtNight Pasadena

Data Corpus: Item 15

LACAC 2015

Kamella Tate, MFA, EdD



Analyzing & Synthesizing Qualitative Data

Getting Started

- **Read through all the texts!**
 - Obtain a **general sense of the data** by doing a preliminary, *exploratory* analysis – reading through the text as many times as you need to **familiarize** yourself with the data.
- Memo your **thoughts/ideas** and think about how the data might be **organized** and/or **presented**.

LACAC 2015

Kamella Tate, MFA, EdD



Analyzing & Synthesizing Qualitative Data

- Start with **one response** or **set of responses to one item**
- Identify text **segments** – ask “what is this/are these person/people saying?”
- Bracket/circle/underline/highlight/? **segments**
- Assign **code** word(s), phrase(s)
- **Cluster** to reduce redundancy
- Collapse codes into **themes**

LACAC 2015

Kamella Tate, MFA, EdD



Writing Up & Reporting

“More so than with traditional research, where conventions are already established, one has the **freedom to express findings in multiple ways**” (Giorgi, 1985, p. 20).

“There are **no standard modes** of presenting the results of [qualitative] studies” (Kvale, 1996, p. 264).

LACAC 2015

Kamella Tate, MFA, EdD



Writing Up & Reporting

- Identify text that provides **support for themes**
 - **Quotes** can come from interview/survey data or observations
 - Look for **dialogue** in the participants' speech, their words/phrases
- Try using **metaphors** and **analogies**
- Locate **multiple perspectives** and **contrary evidence**
- Look for **vivid detail** and **rich, thick descriptions**
- Identify **tensions** and **contradictions** in individual experiences

LACAC 2015

Kamella Tate, MFA, EdD



Writing Up & Reporting

- **Tailor content to audience**, remove jargon, be concise
- **Create visual interest** through tables, graphs, images
- **Use call-out quotes** from participants, from the literature, from experts in the field
- **"Shape" the reader's experience** so they get all the way through to the end!

LACAC 2015

Kamella Tate, MFA, EdD



Stuck?

- **Introduction**
 - Brief **description** of the project and your evaluation. What was the **purpose**, what were your **goals**?
- **Methods**
 - How was the data **collected**? **Analyzed** (coding, clustering, thematizing; representing; interpreting)? **And . . .** ?
- **Findings**
 - **Descriptive** elements: Event, place, people, activities
 - **Themes**: feelings, experiences, motivations, interests, benefits, etc.
 - **Representation and display**
- **Summary**
 - New **knowledge/understanding**, **suggestions**, **applications**, etc.

LACAC 2015

Kamella Tate, MFA, EdD



Representation & Display

(Miles & Huberman, 1994)

- Themes, patterns, structures, connections, relationships, etc. are . . .
 - **Discovered/revealed**, **explored**, and **visualized** using data presentation approaches such as . . .
 - Matrices, tables, charts, networks, images, clouds, and other graphical formats

LACAC 2015

Kamella Tate, MFA, EdD

**Music Center On Tour
Focus Group Study**

***Determining Interest and
Motivating Participation***

Preliminary Model
http://www.musiccenter.org/Global/Education/Research%20and%20Evaluation/MCOT2011FocusGroups_Narrative.FINAL.pdf

WHERE COST MATTERS LEAST

Clients are most motivated to buy when MCOT services are perceived to be easy to access, book, and present; of high artistic and educational quality; and culturally and academically relevant.

LACAC 2015Kamella Tate, MFA, EdD

An Ecology of Creativity

PRODUCT

- Novel
- Appropriate
- Useful
- Unusual
- Domain-value
- Heuristic response
- Adaptive
- Coherent
- Surprising
- New, rare

PRESS: MOTIVATION PROPELS

- Love of the work
- Aesthetic sensibilities
- Personal satisfaction
- Challenge and enjoyment
- Financial rewards
- Professional recognition

PERSON

- Cognitively and emotionally flexible
- Heightened sensitivity to problems
- Confident, non-conforming
- Ideationally fluent, complex, overinclusive
- Ability to analyze and synthesize
- Open to experience, curious
- Habitually divergent thinker
- Habitually convergent evaluator
- Possesses domain-relevant knowledge
- Possesses creativity-relevant knowledge
- Resistant to closure
- Set breaking

PRESS: WORKPLACE COMPELS

- Work resources and processes
- Feedback and recognition
- Trust and support for risk-taking
- Communication and community
- Shared goals
- Inspiring purposes

PROCESS

- Non-linear progressivity
- Cyclical, iterative
- Constrained, bounded
- Problem finding/solving
- Problem pointing/expressing
- Conscious/unconscious
- Experimenting/verifying
- Active/reactive

PRESS: FIELD SELECTS AND SHAPES

- Evaluation by gatekeepers
- Communication of nuances
- Dissemination of discoveries

LACAC 2015Kamella Tate, MFA, EdD

