QualPal activity & facilitation handbook

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# QualPal – an open access card game for qualitative researchers and evaluators

## What is QualPal?

QualPal is designed to support you when you’re sitting in front of your data thinking, ‘What’s next?’. It consists of concrete techniques and steps that experienced analysts use and that are often implicit in teaching qualitative methods.

QualPal consists of a deck of cards that contain concrete techniques that can help you analyze your data. They can provide you with things to do when you’re stuck, and you can use them to reflect on analytic processes that you have already undertaken. QualPal can also help you facilitate group analysis of qualitative data by providing prompts and guideposts during the discussion of data.

# Why we developed QualPal

Teaching how to actually do qualitative analysis in practice is a widely spread challenge for methods educators (Hurworth 2008; Schmieder 2020). Especially time restrictions and class size make it hard to apprentice learners in how analysis plays out in practice. Instead, many learners are forced to ‘figure it out’ somehow – whatever ‘it’ is. Additionally, many analysts are not explicitly trained to lead group-based analysis sessions. They often struggle with facilitating team analysis processes in a way that is productive and leads to meaningful analytic products.

In our work at the University of Wisconsin – Madison, we support researchers and evaluators in successfully doing qualitative analysis. We regularly teach the use of QDAS through group analysis processes (‘[Data Jams](https://fyi.extension.wisc.edu/datajams/)’; see also Schmieder/Caldwell/Bechtol 2018). Through our evaluations and informal conversations we learned that oftentimes, analysts found that our facilitation of the team analysis process was more useful for them than the technical understanding of using QDAS. Based on that feedback, we started analyzing how we ourselves taught the practice of analysis by observing each other in consulting sessions. We found that we used a fairly stable set of analytic techniques (or: procedural pointers) to help analysts structure their work, and help them get un-stuck.

Experienced analysts are able to ‘keep in mind’ and contextually apply an array of analytic heuristics – techniques – as they go about their work with data. Teaching the craft of analysis is tricky business because: (a) oftentimes analytic heuristics remain implicit when experienced analysts discuss how they work; (b) analytic techniques are rarely made explicit in published qualitative research; (c) the analytic process can play out in many different ways - especially if the process is driven heavily by the data.

To simulate an experienced analyst at the table, and to simulate the flexible nature of analysis-in-practice, we decided that analytic techniques should not be represented in a list. Rather, we wanted to design a tool that allows analysts to flexibly pull and arrange (and be playful with) analytic techniques. That’s why QualPal ended up being a deck of cards.

QualPal’s flexible, playful design was inspired by games. Both tabletop and digital games afford ways of problem-solving that align well with qualitative analysis, such as encouraging the use of distinct tools, complex strategies, and nonlinear connections between ideas. For instance, a successful game of chess requires a nuanced understanding of how each piece functions, the potential moves both players could make, and an evolving awareness of how changes in board layout affect future possibilities. Yet, unlike chess, qualitative analysis is not bound to finite permutations and instead can unfold in countless ways with different data, methods, and analysts, as previously mentioned. This is why QualPal does not require specific rules but rather presents a series of prompts to help analysts think broadly and strategically about data.

## References

Hurworth, R. (2008). Teaching qualitative research: Cases and issues. Rotterdam: Sense Publishers.

Schmieder, C., Caldwell, K. E. H., & Bechtol, E. (2018). Readying Extension for the Systematic Analysis of Large Qualitative Data Sets. Journal of Extension, 56(6).

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# Some Caveats

It was not our goal to proclaim some sort of authoritative list of analytic heuristics. Quite the opposite: our goal was to build a playful and flexible medium for reflecting on qualitative work, and for designing analytic processes.

Our materials assume that your data has already been collected and cleaned up so that it is in workable, (often: readable) form. Please note that QualPal’s focus lies on analytic process design – it is not a tool for overall research or project design.

Along those lines: QualPal is not a method. Rather, QualPal contains commonly used techniques and activities, so you can “play” with them, explore them, expand them. You may find some things from your own methods and habits missing. That is actually the point: QualPal is designed to help you reflect upon analysis processes. It is a starting point.

# How you can use QualPal

The QualPal Technique Cards can be used in many different ways: either by a solo researcher/evaluator or with a group, and either as a whole set or as smaller groups of the cards. Here are a few ideas for using the cards as a starting point. You can find more detailed activity outlines in the next section.

REFLECT - Shuffle the Technique Cards and lay eight of them in front of you. Think of your most recent analysis. Sort all Technique Cards by techniques you used and techniques you did not use. How did this affect your analysis?

PLAN – When you are stuck with your analysis, search through the Technique Cards and select two techniques that you have not used with this piece of data. Apply the technique and repeat as needed

REVIEW – Analysts read an assigned section of a methods book or article and make their own Technique Cards based on the readings. Participants can also use this to critique how clear the authors are when discussing methodological techniques

OBSERVE – Shuffle the Technique Cards and have each analyst draw up to four cards (depending on the size of your group). Model a talk-aloud analysis in front of the group. Analysts look for the techniques on the Technique Cards in their hands and later share with the group what effects those techniques had.

PRACTICE – At the start of an analysis session, analysts choose Technique Cards that they think will be helpful. They then analyze data together for 10–15 minutes. Then discuss if/when they used the chosen Techniques and how those affected the group’s analysis.

NEGOTIATE – Choose Technique Cards that represent ‘ground rules’ that you think are always useful in their analyses. Then discuss with others in your analysis team. The whole group then collectively decides on three ground rules to use in each participant’s or the group’s next analysis session.

# The cards

The techniques on these cards are useful for many analytic processes and situations. But they’re not an exclusive list: Feel free to add cards, and to modify cards based on your needs. Many folks asked us why the cards do not have more descriptions related to the techniques on them. The reason for this is: We want the cards to be conversation starters; prompts for reflection. The more information the technique cards contain, the more prescriptive and narrow the idea behind the technique becomes. Also, we found in playtests that additional text is distracting from the reflective activities: Our first prototypes actually had explanatory text on the back of the cards – but learners got ‘sucked’ into the text, having a hard time resisting to read, rather than engaging in playful interactions with each other via the cards.

[insert 1-2 pages of designed cards]

# Activities for individual analysts, research teams, communities of practice, and methods classrooms

Below you find a few more detailed example activities with QualPal. We’ve used (and iterated) these activities in many methods classrooms and with learners in professional contexts. If you have feedback, modifications and your own ideas for activities: please reach out to us ([christian.schmieder@wisc.edu](mailto:christian.schmieder@wisc.edu)/kyrie.caldwell@wisc.edu), we’re interested to hear how you use QualPal.

## Reflect: Becoming familiar with the technique cards, and sharing how you’ve done analysis in the past

**Goals:** Become familiar with the techniques outlined in the cards, and connect how the techniques connect to strategies and processes you and others have used in the past. If you use this as a warm-up for an analysis group, an additional goal is to set analytic ‘ground rules’.

**Group size**: 2–40

**Time:** 30–50 minutes

**When to use:** This is a great activity to get folks familiar with the cards, for example, if you plan to use them later on in other activities. We also like to do this activity as a warm-up for smaller analysis groups, before we start analyzing. It helps us playfully and collaboratively set certain ‘ground rules’ for the analysis that helps us structure the process. This activity is also great when you have a group that has different levels of experience with qualitative analysis: Because it creates a structure to make explicit and share past analytic processes and ‘tricks of the trade’.

**5–10’: Introduce the activity and what individuals will learn.**

Also, make explicit why you’re asking folks to do this activity (e.g., by connecting it to the existing curriculum or capacity building).

**5’: Pass out cards and discuss ‘ground rules’**

1. The facilitators read and pass out “ground rules” cards to the group: We usually like “Take Notes in Full Sentences, Read Aloud or Listen to your Audio, Stop at Every Sentence.” for this. But you can obviously choose different ones! One of the facilitators should write these on a whiteboard/projected screen visible by the whole room.

2. Ask the group: What do you think do these ground rules do, and why is that valuable? E.g., How does taking notes in full sentences structure an analysis process? What is a valuable product that this technique fosters? This step models the kinds of discussions group members will have 1-on-1 in the next step.

**5–10’: Discuss more cards in groups of 2–3.**

1. Now pass out more QualPal cards: 4 cards per 2–3 people. To do this, just shuffle the cards, or ask group members to shuffle their own deck of cards to pull from.

2. The task for each small group of 2–3 is:

a. For each card, share what you think this technique does in the analytic process. Where would it be helpful? Have you done this in the past?

b. Select 2 of these cards you pulled that you think would be most helpful to analyze data (e.g., the data the group will analyze today). Each group should be ready to explain why they picked the technique, and what they think it does for the analysis.

**10–25’: The pairs/small groups describe to the full group the Techniques they chose.**

If this is used as a warm-up for co-analysis, one of the facilitators writes the pairs’ chosen Techniques on the board/screen. Ask the group to ‘vote’ on 3–4 additional techniques that they pledge to use in the analysis session. If you do this, plan for 10–15 minutes of debrief time after the analysis part of the session.

### OBSERVE: QualPal ‘Bingo’

**Goals:** Become familiar with the techniques outlined in the cards, and discover how the techniques relate to strategies and processes of experienced analysts. Become familiar with how experienced researchers ‘talk’ qualitative analysis when interpreting data together.

**Group size:** 4–40. This requires that you have 2–4 experienced analysts who do a talk-aloud of an analysis session.

**Time:** 30–45 minutes.

**When to use:** This is another great activity to get folks familiar with the cards, for example, if you plan to use them later on. We also like to do this activity as a warm-up for smaller analysis groups, before we start analyzing – but it requires that you have 1–2 analysts in the group who can stage a ‘mock analysis’ for the group to observe. This is also a great activity for analysis team leaders: You can do this activity by yourself, observing your team to better understand their analytic habits and group dynamics.

**5-10’: Introduce the activity and what individuals will learn**. Establish groups of 3–4 people who are one workgroup.

**5’: Hand out one deck of QualPal cards to each group, and ask each group to draw 5-10 QualPal cards**. They should lay the cards out in front of them, face-up.

**10-15’: The experienced analysts now start collaboratively analyzing a sample set of data.**

a. The groups have the following task: Every time they see a technique on their table that’s being used by the analysts, they pick up, or flip the respective card.

b. The group can at this point quietly discuss the role of the technique in the process they observed. What happened because analysts did that?

c. Once a group has picked up or flipped a certain amount of cards (e.g., 5), they shout ‘Bingo!’ and the activity stops.

**10-15’ Discuss and share how the techniques shaped the analysis.**

Each group should pick 1–2 techniques that they saw utilized, and share with the group what the effects of using the technique were.

Note: The analysts can of course check out the cards beforehand, and identify some techniques that they want to evoke in their mock analysis.

Note: You can use this exercise to observe analysts with a partner who is observing a different group. Later, compare your QualPal cards to see how different analysts used and combined these techniques.

Note: When we have the time, we like to use both this activity and the REFLECT activity above to get analysts familiar with the QualPal tool.

## Reflect & plan: Using QualPal as a tool to make implicit processes explicit

**Goal:** Analysts reflect on their own analytic workflows and are able to make explicit to themselves and others what they do when they analyze data.

**Group size:** 1–2 individuals per group; total group size not limited

**Time:** 30–50 minutes

**When to use:** This is an effective (and time-efficient) reflection activity during methods training, when learners have already completed a few practice analyses based on different methodological approaches. The focus on concrete techniques can help them see commonalities in the concrete processes, and also how using different techniques can shape fundamentally what we see in (and make of) the data.

**5’: Split learners/analysts in pairs, and ask each dyad to write “Previous Analysis” on the left side of a horizontal piece of paper and “Next Analysis” on the right side.**

**10’: Learners/Analysts shuffle their Techniques Cards, and draw 4–5 at a time.**

○ Each time they draw the cards, they identify if they used these techniques in their last analysis. They additionally explain to each other what these techniques did for them in terms of insight, driving the analysis forward and in terms of overall work management.

**15–35’: Ask each dyad to re-design a workflow with techniques they did not use. If you have more time, the teams could also apply the new workflow to a sample data set and discuss their experience with the group.**

● Reflection questions for this step: How would these different techniques change the perspective on the data? What kinds of products would this type of analysis yield? What are the pre-requisites for this type of analysis?

## Observe: Interview an analyst with QualPal cards as prompts

**Goals:** Learn from an analyst (e.g., your advisor, or P.I.) how they go about their work when they sit with their data.

**Group size**: 1–3.

**Time:** at least20 minutes.

**When to use:** This is a great activity if you want to learn how others analyze their data, in very concrete terms. It specifically helps when it comes to unpacking broader tasks in qualitative analysis. (Christian also used this activity in his research interviews with qualitative researchers, to prompt narratives about very concrete workflows when using Qualitative Data Analysis Software.)

**5–10’: Introduce the activity and why you’re asking them to work with the cards.**

**5–10’: Ask your conversation partner to sort the cards into 3 piles: Techniques they often use, sometimes use, and never use.** You can ask them to focus on specific tasks when doing this. For example: Which techniques do you use when you familiarize yourself with the data for the first time? Which techniques do you use when you develop initial codes?

**10-??: Ask your conversation partner to explain how they use the techniques, and ask them what other techniques they use that they haven’t seen on the cards.**

## Plan: Design workflows for broader analytic tasks

**Goals:** Understand what analytic techniques will help you with broader tasks; choose the right tools to get the job done.

**Group size**: 1–3.

**Time:** at least20 minutes; ideally 60–90 minutes.

**When to use:** Understanding your analytic tasks and products is vital when it comes to deciding what tools to use to go about your analytic work. For this you need to consult your methodological approach: What are the major steps outlined by the method? It could be tasks like: ‘Initial familiarization with the data’, or ‘Develop an initial coding scheme’, or ‘Organize data around existing themes’, or ‘Identify and make explicit the patterns between different concepts’. This activity will help you plan out more concretely what you need to do to get these broader tasks done.

1. Based on your method: What are the major steps (i.e., tasks) that you need to achieve? Write a list of these tasks.

2. For each of these major steps: Flip through the QualPal cards, and choose 3–5 techniques that you will use to bring this process to life.

a. For each technique, reflect: What things (objects, features in software) will you use to go about these techniques? For example, you may use a piece of paper to note your hunches. You may use the memo function in QDAS to write up your summary. You might be torn about what ‘thing’ to use for what.

3. For each of your tasks, assess what products these tasks will yield: e.g., a list of codes with tentative definitions or case-based summaries. Then assess how these products will help you with the next tasks.

4. Fill out a table that documents all these reflections. You can find an example below. This document can now help you design and iterate concrete analytic workflows.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Analysis Task:** Initial familiarization of the data  **SCOPE for today:** My interview with Jesse.  **QUESTION:** What am I noticing in the data: What surprises me, and what connections to my research question do I see in these surprises? | | | | |
| Techniques used: | How will I use the techniques? | What digital or non-digital tools will I use? | Products needed to do this | Products I will make doing this |
| Read aloud or listen to the audio  Document Hunches as Hunches  Write in full sentences  Circle back to the research question | How will I listen? The audio player on the laptop? Or should I import the transcript into QDAS and play it from there? Will I need earphones? Especially if I do this in the lab?  While I read, I want to take initial notes and jot down ideas. Maybe some ideas I had during the interview will pop up again. I could print the transcript, and use pens to write ideas in the margins. Then, in a second step, I could elaborate my jottings into full sentences.  Finally, I also want to reflect on how my noticings could relate to my research question. This will help me discover patterns across some of my cases as I explore them. I could write that summary up in my paper-bound research journal, or I could make a document memo in QDAS. | I’ll print the transcripts with wide margins, and I’ll listen along to the interview using my laptop & headphones  I’ll take notes in the margins, and I’ll use a yellow marker to highlight sections that surprise me.  Then I’ll start a case-level memo in my QDAS. I’ll review my notes and elaborate & synthesize them into full sentences, potentially with headlines that explain how the comments related to me answering my research question. | Transcribed data  Audio of my data | An annotated printout of my data  A document that summarizes my exploration of the data and connects my exploration with my research question. |

## About the authors

Christian Schmieder holds a Magister Artium in Sociology and Linguistics (University of Freiburg, Germany), and a PhD in Education (University of Wisconsin, Madison). He works as a Data Specialist & Data Governance Leader at UW-Madison’s Division of Extension. There, he supports researchers, evaluators and community educators in systematically analyzing qualitative data. Since 2009, Christian teaches qualitative methods and serves as a methods consultant to researchers and evaluators in the United States and Europe. Christian’s research focuses on formal and informal methods education, especially when it comes to learning concrete analytic strategies and the adaptation and use of technology (such as qualitative data analysis software). His other research interests revolve around metaphor theory & analysis; cross-language communication & analysis in qualitative research, and communication in video games.

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