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Conducting Qualitative Data Analysis: Managing Dynamic Tensions Within, Part One

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Abstract

In the third of a series of “how-to” essays on conducting qualitative data analysis, Ron Chenail examines the dynamic tensions within the process of qualitative data analysis that qualitative researchers must manage in order to produce credible and creative results. These tensions include (a) the qualities of the data and the qualitative data analysis of these qualities, (b) errors of deficiency and exuberance, (c) tacit and public knowledge, (d) separation and connection, and (e) verticality and horizontality.

Keywords

Qualitative Data Analysis, Metaphor, Dynamic Tensions, Evidence, Unit of Analysis, Recursion, and Qualitative Research

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Conducting Qualitative Data Analysis: Managing Dynamic Tensions Within, Part One

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In the third of a series of “how-to” essays on conducting qualitative data analysis, Ron Chenail examines the dynamic tensions within the process of qualitative data analysis that qualitative researchers must manage in order to produce credible and creative results. These tensions include (a) the qualities of the data and the qualitative data analysis of these qualities, (b) errors of deficiency and exuberance, (c) tacit and public knowledge, (d) separation and connection, and (e) verticality and horizontality., Key Words: Qualitative Data Analysis, Metaphor, Dynamic Tensions, Evidence, Unit of Analysis, Recursion, and Qualitative Research.

Conducting qualitative data analysis (QDA) involves managing dynamic tensions between many distinct yet related sets of complementary analytical processes. In order to produce credible and creative results from their QDA, we as qualitative researchers must be aware of these dyads and administer productive relationships within and among the pairs. In the second paper of this series (Chenail, 2012), I focused on the relationship between data and the analysis of the data suggesting Kenneth Burke’s (1969) notion of metaphor captured the analytical tension between the “this-ness” of the analysis process and the “that-ness” of the unit of data being analyzed (e.g., this code and that which was coded). I emphasized the recursive aspect of this dynamic in that the “this” or result of the QDA activity must always include a part of the “that” or the data being coded in a fashion similar to sourdough bread needing some sourdough to start the process. Conversely, we should always be able to go back to the data and be able to construct evidence for the code from the data. If someone as a reviewer cannot see what we as the qualitative data analyst saw in the data analyzed or if we as investigators cannot offer evidence for the code in that entity which was coded, then the veracity of our resulting analysis is in question.

Using a legal metaphor, we can appeal all that we want to the judge and jury, but proving our case comes down to sound testimony based upon sound evidence. If our evidence is not evident in our testimony or our testimony cannot be tested via our own evidence, then our case is in big trouble. It does not matter how fancy our courtroom rhetoric is, we will not get a decision in our favor if our case is not built upon the rigorous and creative management of the relationships between evidence and testimony. Of course there is the matter of “the law,” but I will address the aspect of QDA in another part of this series.

Even if we have wonderful evidence from which to construct our testimonial accounts of your QDA results, we always need to be aware of making errors of deficiency and exuberance in reporting our qualitative analysis of the quality we create from the data. By deficiency I mean “Don’t try to say less than what the data show” and by exuberance I mean, “Don’t try to say more than what data show.” I base this dynamic

between deficiency and exuberance from the influential linguist Alton Becker's (1995) extensively writing of the Spanish philosopher and author José Ortega y Gasset's ideas of "exuberance" and "deficiency": "Every utterance is deficient – it says less than it wishes to say" and "Every utterance is exuberant – it conveys more than it plans" (Becker, 1991, p. 230). Becker was discussing Ortega's ideas while explaining the challenges of another abstract process, that of translation. In translation, Becker (1991) observed from Ortega's perspective, each language has its own patterns of manifestation (i.e., the "said") and silences (i.e., the "unsaid") so when we attempt to translate manifestation from one language into another language's manifest it is "a matter of saying in a language precisely what that language tends to pass over in silence" (p. 226). As we try to translate the words of one language in another attempting to manage two systems of the "said" and "unsaid," we cannot help but say more and less than what we wish to say about what someone else said. In QDA, I assert we are faced with the same dilemma as we attempt to abstract "something in terms of something else" in our coding and categorizing.

To manage exuberance and deficiency in QDA it is important to accept that the "that-ness" of the data in the form of what the other has said in our study serve as the final arbiter in QDA; so, whatever we say the participants are saying (i.e., our "this-ness" of their "that") has to be evidenced in the data we share (i.e., the "that" in our "this-ness" of the "that"). In other words, the goal of our QDA as a metaphoric process should be the presentation of our manifestations of the other's manifestations. In this metaphoric system, to minimize errors of deficiency, we should make sure we manifest all unique, special, or defining qualitative manifestation of the data bit that inspired our coding or categorizing manifestations in the first place. To accomplish this end, we should keep looping back and forth in an iterative or circular manner between the qualitative notation you have assigned to the data (e.g., the category or theme) and the data itself. To manage errors of exuberance, we should also keep going back to the data to see if our manifestations can be argued from the perspective of the data manifestation itself and not from silences in the data or from extraneous manifestations.

Even if we wanted to say more about our data in our QDA, another relationship facing us as qualitative researchers throughout our studies is the tension between public and tacit knowledge (Polanyi, 1967). During both the data generation and collection phases of our inquiries Polanyi suggests we work from an assumption that our research participants always know more than what they can say or make "public knowledge" through our interviews with them or via our other data generation activities. This "we know more than what we can say and write" aspect of knowledge is what Polanyi (1967) termed "tacit knowledge." Based upon this perspective, we as qualitative researchers spend intensive and/or extensive time in the field observing and asking participants what certain things mean and then ask follow up questions to help the participants bring forth into the public knowledge greater detail and perspectives. This dialectical flow of query and follow-up probe is intended to help make tacit knowledge public and available for analysis. Of course, as we become more and more familiar with our subject matter or become more sensitive to the sensitivities of our study participants, we too will begin to know more than what we can say in our analysis and our reports of these analyses. As we become connoisseurs of our qualitative data (Eisner, 1976), we have to address our own tacit knowledge challenges so we make public what we have come to learn about our phenomenon under study.

One solution to this problem is to write early and often in the QDA process (Wolcott, 2008). Writing is a type of kinesthetic learning (Walling, 2006) so as we manipulate our ideas via the act of writing, we can make more public our thoughts to ourselves. As we read and re-read our textual products this reflective act challenges us to see if our written words are conveying all that we can say about the qualitative differences and similarities arising from our QDA. Having someone else read our work is another valuable asset in the tacit to public process the reviewer cannot read the text from our perspective so they can question us and our text to help us bring forth ideas missing or obscured in our texts. We cannot readily do this because we can read our written words with certain ideas in mind, but we need to get those ideas out of our heads and into our texts. In this fashion, the tension between us and authors and our readers is another critical tension to manage in QDA.

Across all the sets of tensions maybe the primary tension in QDA is that between the acts of separation and connection (Flemons, 1991). In a system based upon the relationships between a “this” and “that” or between codes and that which is coded, the “this” and “that” have to be separate entities, but connected in order to create a meaningful analysis. If the code (i.e., the “this”) is merely a repeat of the contents of the unit being analyzed (i.e., the “that”), then there is no separation. If there is no separation, there is no relationship. If there is no relationship, then there is no perspective. And if there is no perspective, then there is no analysis.

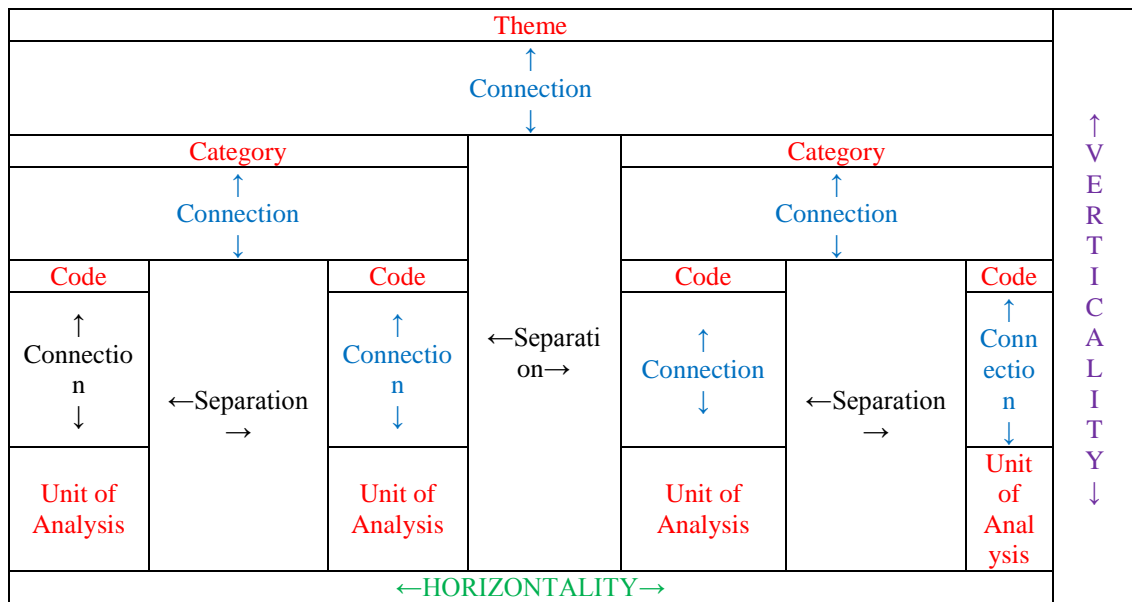
So, ironically, we cannot have an analytical connection (i.e., a “this-ness” of a “that”) without separation between the product of the analysis and the data which initiated the analysis. In other words, if this is the exact same as that then there is no qualitative difference, and no qualitative difference means no qualitative data analysis. We need to make a clear connection between our “this” and the “that” in order for our suggested qualitative metaphoric relationship to make sense, but we must also be able to separate our depiction of our “this” from the “that” we are depicting in order to qualitatively abstract (i.e., the “this-ness”) the qualities of the data (i.e., the “that-ness”). If we do not have separation then the connections we make in our results are just repetitions and not research.

The tension between separation and connection also includes the relationships among codes, categories, themes, and other qualitative transformations of data. As we consider each new code or category we create, we need to assess and articulate the qualitative distinctiveness of each product of our QDA (i.e., an emphasis on separating a distinct “this-ness of a that” from another “this-ness of a that”). We also must consider the qualitative associations one separate product of data analysis has with other previously separated qualitative distinctions (i.e., an emphasis on connections between a distinct “this-ness of that” with another “this-ness of a that”). With this aspect of separation-connection, we as qualitative data analysts create categories and sub-categories, themes and sub-themes, individual textual analyses and composite textual analyses, and so forth. At each of these points, we must assess the integrity and coherence of each separate qualitative difference (i.e., the code to coded relationship or the “this” to the “that”) and each connected qualitative difference (i.e., the categorization of the relationships between the different codes to coded relationships).

Through the QDA process, we create categories by connecting together previously separate coded data. This connection, integration, or aggregation is based on the similarities of meaning we perceive between the individually coded bits of data (i.e., a categorizing “this-ness” of many separate “this-ness of that’s”). In turn, we can continue this connection of previously separate distinctions further by abstracting or conceptualizing categories further to create semantic, logical, or theoretical links and connections between and across the categories. The results of this process may lead to the creation of themes, constructs, or domains from the categories.

One way to assess this relational system of separating and connecting qualitative differences is to attend to another set of complementary analytical tensions -- verticality and horizontality (see Figure 1). In this dual process we attempt to assess and articulate the metaphoric relationship between the code and that which it is coding (i.e., an emphasis on the vertical credibility of the meanings asserted from the perspective of a connecting a particular this of a particular that) while also attempting to assess and articulate the metaphoric relationship between different codes (i.e., an emphasis on the horizontal credibility of the meanings asserted from the perspective of separating particular this/that’s from other particular this/that’s; Chenail, 2008).

Figure 1. *Relational System of Separating and Connecting Qualitative Differences Vertically and Horizontally*



In constructing this vertical and horizontal system of qualitative connections and separations, it is important we evaluate how each category has connectional integrity (i.e., is there a high degree of qualitative connection or similarity across the individual qualitative coded units within the category?) and separational integrity (i.e., is there a high degree of qualitative separation or differentiation between or among the array of qualitative categories?). Qualitative data analysts not only must judge the internal and external coherence across the system of separations and connections, but also must be

cognizant of the coherence between the separate codes and categories and their respected connected phenomenon in question.

As we have seen QDA, along with administering the relationships between data and code, between exuberance and deficiency, between tacit and public knowledge, and between separation and connection, we must also manage tensions between verticality and horizontality so we create an exhaustive and rigorous system of qualitative renderings that cohere with the qualities we assert in the data we present. In constructing these qualitative findings to establish their credibility we need to systematically maintain and challenge the connections we create between the codes and categories and the empirical evidence we claim from the data. Our exemplary quotations and excerpts should always remain in contact with their respective codes and categorizations. This contact should also be extended to the publication of the findings so that editors, reviewers, and readers can judge the merits of any QDA findings we make based on artifacts from the phenomenon in question (e.g., direct quotations). If done well, through our presentation of a system of separately distinct qualitative findings connected with rich and vivid exemplary qualitative quotations or observations, we can create a credible account of the findings of a study and a meaningful contextualization of both the metaphorical and recursive relationship between the “this-ness” of our analysis and the “that-ness” of which we analyze. Searching and re-searching the dialectical relationship between the two connected, but separate elements will help us to manage our errors of deficiency and exuberance and to manage better how we make public a “this-ness” of a “that.”

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