PROJECT NAME *Defining Mass Observation* **Name of Analysis Phase** Experiment with coding strategies (phase 3)			FIVE LEVEL QDA® *Analytic Planning Worksheet*

Level 1: **OBJECTIVES &** **METHODOLOGY**	**OBJECTIVES** To increase knowledge about Mass Observation writers' socio-demographic characteristics, writing behavior, self-perceptions and the influence of key events on their lives
	GUIDING METHODOLOGY Mixed methods cross-disciplinary team-based research involving the combination of qualitative and quantitative data and secondary thematic analysis of archived writings
Level 2: **OVERALL** **ANALYTIC PLAN**	**CURRENT CONCEPTUAL FRAMEWORK** To be developed as the outcome of the planning stage
	PRIOR COMPLETED Phase 1: Specify parameters of pilot analysis. Phase 2 : Familiarize with content of sample the transcripts
	CURRENT Experiment with coding strategies
	NEXT ANTICIPATED Plan the analysis of the whole set of Writer responses for Social Divisions and My Lifeline

Level 2: **ANALYTIC TASKS**	**Level 3: TRANSLATION**	**Level 4: SELECTED TOOL or** **Level 5: CONSTRUCTED TOOL**
3-A Identify potential and emerging concepts in the transcripts	**UNITS:** Concepts (unit of meaning), Transcripts (units of data) **PURPOSE:** to determine if pre-identified concepts are present in the transcripts and whether other concepts we haven't yet thought of are present **POSSIBLE COMPONENTS:** Concepts = NODES, CODED-REFERENCE, SETS & SEARCH-FOLDERS, QUERY-RESULT, ANNOTATION, MEMO, MAP Transcripts = SOURCES, MEMOS *Writing/visualizing* = MEMOS, ANNOTATIONS, MAPS, CHARTS **CHOSEN COMPONENTS:** Concepts = NODES Transcripts = SOURCES Writing = MEMOS **EXPLANATION:** • Each Writers' transcript has already been imported as a separate SOURCE. • Each SOURCE has a linked MEMO created previously (phase 2) and the template also previously created (phase 2) can be pasted into these MEMOS to structure note-taking. • Potential concepts have already been created as NODES (phase 1), so NODES can be linked to REFERENCES within SOURCES to produce CODED-REFERENCES. • We know from the familiarization with the data (Phase 2) that there are likely to be lots of other concepts contained within Writers' SOURCES, so we need to also create new NODES as we identify these concepts. New NODES can be created, defined and linked to REFERENCES (to produce CODED-REFERENCES) at any stage	Constructed tool: Combining software operations 1. Paste the content of the critical readings template created in 2-D into each Writer's MEMO created in 2-B. 2. Rearrange notes made in each MEMO into the Sections of the template. 3. Link NODES representing potential concepts created in 1-C to relevant REFERENCES in each SOURCE. 4. Create new NODES, define them in the Description field, and link them to REFERENCES as additional relevant concepts are seen in SOURCES. 5. While undertaking steps 3 and 4, make notes in the sections of each Writers' MEMO

3-B	UNITS: Writers, Emotions	Selected tool: straightforward use of the Nodes Area
Capture how writers' express their emotions	PURPOSE: To identify expressions of different emotions within Writers' narratives.	Create two parent nodes in the Nodes Navigation Area: 'Feelings and Perceptions' and 'Focus of Perceptions'. Create and link child-nodes representing emotions and expressions to relevant references. Keep notes about the process in a memo for each node
	POSSIBLE COMPONENTS:	
	Writers = sources, folders, sets & search-folders, memos, attribute-values, nodes, cases	
	Emotions = nodes, coded-reference, sets & search-folders, query-result, annotation, memo, map	
	Writing/visualizing = memos, annotations, maps, charts	
	CHOSEN COMPONENTS:	
	Writers = sources	
	Emotions = nodes	
	Writing = memo	
	EXPLANATION:	
	Each Writers' transcript has already been imported as a separate source so we will continue using sources to represent Writers.	
	We have previously used nodes to represent concepts so it makes sense to use nodes to represent the way Writers' express emotions. We can create a separate area in the Code System to store nodes for capturing the emotions expressed by Writers.	
	We can go back through each source and apply these nodes to previously coded-references. Later we can interrogate the way Writers' express themselves in relation to potential and emerging concepts, using the Matrix Coding Query.	
3-C	*UNITS:* Timing, Writers, Life events	Selected tool: straightforward use of the Code System
Capture the timing of writers' life events (My Lifeline responses)	*PURPOSE:* To identify if there are patterns in the chronology of Writers' life events	Create a new parent NODE called 'Time-Chronological'. Review each SOURCE and find CODED-REFERENCES where writers' mention a specific date. Create and link child-NODES representing years to relevant CODED-REFERENCES. Keep notes about the process in a MEMO for the parent NODE
	POSSIBLE COMPONENTS:	
	Timing = NODES, CODED-REFERENCES, SETS & SEARCH-FOLDERS, ANNOTATIONS, MEMOS, MAPS, CHARTS, ATTRIBUTE-VALUES	
	Writers = SOURCES, FOLDERS, SETS & SEARCH-FOLDERS, MEMOS, ATTRIBUTE-VALUES, NODES, CASES	
	Life events = NODES, CODED-REFERENCES, SETS & SEARCH-FOLDERS, ANNOTATIONS, MEMOS, MAPS, CHARTS, ATTRIBUTE-VALUES	
	Writing/visualizing = MEMOS, ANNOTATIONS, MAPS, CHARTS	
	CHOSEN COMPONENTS:	
	Chronology = NODES	
	Life events = NODES	
	Writing = MEMO	
	EXPLANATION:	
	• ATTRIBUTE-VALUES can be linked to SOURCES or CASES. However, linking chronological ATTRIBUTE-VALUES to SOURCES is not sufficient to fulfill this task as Writers mention many different dates within their SOURCES. Linking ATTRIBUTE-VALUES to CASES would work for this task if we were using CASES to represent life-events but we have already used NODES for this purpose which cannot have ATTRIBUTE-VALUES linked to them. We could turn the life-events NODES into CASES in order to use ATTRIBUTE-VALUES, but we want to keep all concepts stored together.	
	• Life events have been captured at potential and emerging concepts (3-A). If we create a NODE for each date mentioned in Writers' SOURCES, we can re-code the CODED-REFERENCES to capture when a Writer mentions a specific date.	

| 3-D

Capture writers' ranking of professional social status (Social Divisions responses) | **UNITS:** Writers, Ranking (of professional social status)
PURPOSE: To identify if there are patterns in how Writers' rank the social status of different professions
POSSIBLE COMPONENTS:
Writers = SOURCES, FOLDERS, SETS & SEARCH-FOLDERS, MEMOS, ATTRIBUTE-VALUES, NODES, CASES
Ranking (of professional social status) = NODES, CODED-REFERENCES, SETS & SEARCH-FOLDERS, ANNOTATIONS, MEMOS, MAPS, CHARTS, ATTRIBUTE-VALUES
Writing/visualizing = MEMOS, ANNOTATIONS, MAPS, CHARTS
CHOSEN COMPONENTS:
Writers = SOURCES
Rank (of professional social status) = ATTRIBUTE-VALUES
EXPLANATION:
• We could make notes about Writers' ranking of the Professions in their MEMO, but this would not allow us to query on the basis of their ranking.
• NODES and ATTRIBUTE-VALUES applied to SOURCES can be used to query. We decided to use ATTRIBUTE-VALUES applied to SOURCES because we wanted to be able to group SOURCES according to Writers' ranking of them.
• We decided there was no need to keep notes about this process whilst undertaking it. | Constructed tool: custom use of ATTRIBUTE-VALUES

1. Create an Attribute for the each of the eight professions the Social Divisions 'Directive' had asked writers to rank according to social status (e.g. Doctor, Minister of Religion, Pop Star, etc.).
2. Scroll through each Social Divisions SOURCE to identify Writers who had completed the ranking exercise.
3. Apply numeric ATTRIBUTE-VALUES (1-8) to their SOURCE for each profession according to their ranking.
4. Assign the ATTRIBUTE-VALUE 99 for all the Professions attributes to SOURCES for Writers who had not completed the ranking exercise. |
| 3-E

Reflect on the concepts captured so far | **UNITS:** Concepts
PURPOSE: To review the work done so far and to reflect on whether proceeding in this way will enable the research objectives to be fulfilled
POSSIBLE COMPONENTS:
Concepts = NODES, CODED-REFERENCE, SETS & SEARCH-FOLDERS, QUERY-RESULT, ANNOTATION, MEMO, MAP
Writing/visualizing = MEMOS, ANNOTATIONS, MAPS, CHARTS
CHOSEN COMPONENTS:
Concepts = CODED-REFERENCES retrievable from NODES
Writing = MEMOS
EXPLANATION:
• To review coding we need to retrieve the CODED-REFERENCES linked to NODES. To reflect on this, we need to write. We already created a 'Planning' MEMO for this purpose. | Constructed tool: combination of software operations

1. Retrieve CODED-REFERENCES linked to each NODE, one-by-one, by opening each NODE
2. Reviewed CODED-REFERENCES and make notes in the relevant NODE-MEMO.
3. In a team meeting discuss the process and add joint reflections on the pilot process and outcome of 3-A, 3-C and 3-D to the 'Planning' MEMO. |

REFLECTIONS

- Phase 2 identified that the way in which Writers express themselves was quite varied, so we decided to capture this by creating codes for the different feelings and perceptions that we identified in Writers' narratives, and the focus of those feelings and perceptions (Perception of others on self, Perceptions about others, and Perceptions about Self) (3-B). After coding only 20 documents we had already created 21 codes in these two areas. Although these codes were enabling us to capture the diversity in the way Writers were expressing themselves, we were concerned that continuing in this way would result in a large number of very specific codes. The way Writers express themselves was only one dimension of our interest in this data and therefore we decided we needed to be more focused about how we captured these aspects.
- Reviewing the coding in 3-E also illustrated that in order to maximize consistency amongst the three coders we needed to have as streamlined a Coding System as possible. It was clear that we would need to create a large number of codes in order to adequately reflect the diverse content of the material. For these reasons we decided that the first wave of coding should be essentially descriptive, and that we would then need to prioritize areas for more in-depth analysis.
- When we retrieved CODED-REFERENCES as part of the reflection process (3-E) it became clear that coding life events with a date code was too cumbersome a way to capture the chronology of Writers' lives for our purposes. Although we could map out the dates that life events were mentioned across My Lifeline writers using a Matrix Coding Query, because Writers were of different ages, this was not a meaningful comparison. In addition, while some Writers had specified when the events they wrote about had happened, others had not, and therefore it was clear we would not be able to capture the chronology of life events for all Writers. We therefore decided to abandon this task and concentrate on interpreting the meanings Writers attributed to the events they discussed.