Strategies in Teaching Secondary Analysis of Qualitative Data

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Abstract: Unlike for quantitative approaches, the published literature on secondary analysis of qualitative data is sparse. Among qualitative researchers there is neither a pervasive culture that exists to encourage the secondary analysis of data nor is there an extensive body of published sources that can help guide or instruct a researcher wishing to understand better the benefits and limitations of re-analysis. So where does the student or novice researcher turn for guidance and training? In this paper we set out ways in which ESDS Qualidata (University of Essex) has sought to facilitate both usage of archived qualitative data and methodological debate among the wider academic communities. We will present an overview of the current published literature and existing training provision for secondary analysis of qualitative data and describe the various approaches to support and training taken by our service. Finally, we will cover the preparation of potentially useful kinds of training materials (teaching datasets, user guides, commentary and exercises) that we believe will help support teachers and learners to incorporate secondary analysis methodology into everyday research culture and practice.

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1. Introduction

The use of real-life data in teaching substantive or methodological perspectives in the social sciences adds interest and relevance to courses. Students who gain their experiences of data analysis from the use of archived data from published studies can gain a good understanding of the complexity of data analysis as it relates to the "real" world. Students gain the opportunity to understand the rationale for collecting data and can develop critical faculties to judge the strengths and weaknesses of a particular data collection strategy or analytic approach. Data can be chosen to be of particular relevance to the subject being taught and thus can bring both substantive and methodological topics alive. But what about methods for secondary analysis of qualitative data—how do we go about teaching this approach? Where can we turn for guidance if, for example, we want to incorporate the approach into our postgraduate methods course next semester? Unlike for quantitative approaches, the published literature and educational textbooks on secondary analysis of qualitative data are a challenge to find. Among qualitative researchers there is still neither a widely prevalent culture that exists to encourage the secondary analysis of data nor is there an extensive body of published writings that can help instruct the new researcher wishing to understand better the benefits and limitations of re-analysis of qualitative data. [1]

ESDS Qualidata, the UK's national qualitative data service, has spent some ten years experimenting with strategies to facilitate both usage of archived qualitative data and methodological debate among the wider academic communities. In the sections that follow, we review the limited published literature that is currently available and outline existing outreach and training provision for secondary analysis of qualitative data. We describe in some detail the various approaches taken by ESDS Qualidata to provide user support and training, aimed at students of research (from the novice to the more experienced "refresher"). In presenting examples of some of the more successful kinds of training materials provided and strategies used by the service to help reach out to the teaching and learning communities, we highlight the importance of providing rich context to support data re-analysis. Tailor-made teaching datasets, enhanced user guides to accompany raw data, commentary on the data and computer-oriented data analysis exercises using archived data can help support a dynamic teaching and learning experience. [2]

This article is based on a paper presented at the RC33 Sixth International Conference on Social Science Methodology that took place in Amsterdam in August 2004. [3]

2. About ESDS Qualidata

ESDS Qualidata is a specialist service of the Economic and Social Data Service (ESDS) led by the UK Data Archive (UKDA) at the University of Essex. The ESDS is a national data archiving and dissemination service that came into operation in January 2003. The service is a jointly-funded initiative sponsored by the Economic and Social Research Council (ESRC) and the Joint Information Systems Committee (JISC) and provides access and support for an extensive range of key economic and social data, both quantitative and qualitative, spanning many disciplines and themes. [4]

The ESDS is a distributed service, based on a collaboration between four key centres of expertise: UK Data Archive; Institute for Social and Economic Research (ISER); Manchester Information and Associated Services (MIMAS); and the Cathie Marsh Centre for Census and Survey Research (CCSR). These centres work collaboratively to provide preservation, dissemination, data enhancement, user support and training activities. ESDS comprises a number of specialist data services that promote and encourage data usage in teaching and research across the following areas: large scale government survey data; longitudinal survey data; international macro and micro data; and qualitative data. All four services have their own dedicated web site, help desk, JISCmail list, online data access and download services, a programme of promotional and training activities, and online support materials. Data and document enhancements to key ESDS data collections represent the main value-added work undertaken by the four services. [5]

The dedicated qualitative data service, ESDS Qualidata, provides access and support for a range of social science qualitative datasets. The service builds on Qualidata's ten years of expertise and international reputation in this area and is regarded as one of the international centres of expertise for archiving qualitative data on a national scale (CORTI & THOMPSON 2004; CORTI 2000, 2004). [6]

The qualitative data held by ESDS Qualidata are typically acquired via the ESRC Datasets Policy that requires all research grant award holders to offer data collected during the course of their research for preservation and sharing through the ESDS. Thus from an acquisitions point of view, the UK Data Archive has been fortunate in that it has been sufficiently supported to build up both a viable operation and a stock of data through the framework and infrastructure of a national policy for archiving data. As such, this UK model, that is now, thankfully, beyond its probation phase, offers a pioneering exemplar to other countries as to how to enable the systematic collection and secondary use of qualitative data. [7]

The service's focus is on acquiring digital data collections from purely qualitative and mixed methods contemporary research and from UK-based "classic studies". All data are considered, either proactively or reactively, but the main inflow is via ESRC research grants, through which primary data are collected. As such, ESDS Qualidata plays a pivotal role in working closely with data creators to ensure that high quality and well-documented qualitative data that have longer-term value are

produced. As part of its core functions, both general guidance and a dedicated advisory service are provided for data creators and depositors on research project management, issues of confidentiality and consent, and documentation of data for archiving. Taken seriously at the start of a research project, good practice across these areas extends the usability lifetime of data and potentially enables creative and flexible re-use of data. [8]

ESDS Qualidata offers a resource discovery hub via the UKDA online catalogue that holds some 4000 data collections across the disciplinary and methodological spectrum. The catalogue also points to other accessible sources of qualitative data across the UK not physically held by the UKDA. The service continues its earlier role in facilitating the preservation of important large paper qualitative research collections, and where appropriate, digitizes samples of these collections. [9]

ESDS Qualidata is committed to creating value-added data resources as well as developing online access to qualitative data within appropriate ethical and legal frameworks, which we describe later. For a discussion on ethics see CORTI, DAY and BACKHOUSE (2000). Finally, ESDS Qualidata offers user support and training to encourage professional researchers and research students alike to make full use of the rich sources of archived qualitative data, a topic also discussed later in some depth in this paper. [10]

3. Kinds of Qualitative Data Available for Secondary Analysis

Qualitative data are collected across a range of social science disciplines, with varying techniques or emphasis, but typically aiming to capture lived experiences of the social world and the meanings people give these experiences from their own perspectives. Often a diversity of methods and tools rather than a single one are encompassed. The types of data collected vary with the aims of the study and the nature of the sample. Samples are most often small, but may rise to 500 or more informants. Such data include interviews—whether in-depth or unstructured, individual or group discussion—fieldwork diaries and observation notes, structured and unstructured diaries, personal documents, or photographs. Thus any one study may yield a wide range of data types for archiving. Moreover, most of these types of data may be created in a variety of formats: digital, paper (typed and hand-written), audio, video and photographic. In terms of acquiring data for its collection, ESDS Qualidata primarily deals with digital textual data, that is, "born digital" data in the sense that the text is word-processed, and also non-digital data that has been digitised, for example by processing paper through optical character recognition (OCR) software. [11]

In Britain, the 1950s onwards saw an unprecedented growth of quantitative and qualitative social research resulting in the spread of its themes and the development of its methods. From the 1960s into the 1970s, sociology was not only an exceptionally popular subject with students, but was also given more national research resources than at any time before or since. This enabled social researchers to carry out studies of a scale unlikely ever to be equalled. An

example is Peter TOWNSEND's in-depth investigation into the nature and status of older people's institutions in postwar Britain. The publication resulting from this research, *The Last Refuge* (TOWNSEND 1962) was considered a pioneering piece of research when it was published in 1957 and attracted much publicity for its focus on an important and hitherto neglected area of policy, and also for its methodology and its policy recommendations. But Peter TOWNSEND's meticulously preserved fieldwork descriptions of old people's institutions and accompanying interviews, now archived and available to researchers at the University of Essex, are equally significant. [12]

Clearly the scope and format of data usually determine its potential for secondary analysis. For example, data from a research study that collected, recorded and transcribed a hundred or so in-depth interviews and documented detailed field notes, particularly when based on a clear sampling strategy, are much more likely to be useful than a set of hand-written interview notes from twenty or so brief semi-structured interviews. But as with many archived sources, sometimes the most exciting discoveries arise from re-examining material which hitherto has not been thought worth researchers' attention. David ZEITLYN argues that field photographs and audio-visual material are probably among the most prolific and least exploited resources produced by anthropologists (ZEITLYN 2000). [13]

Archived qualitative data are thus a rich and unique, yet too often unexploited, source of research material. They offer information that can be reanalysed, reworked, and compared with contemporary data. In time, too, archived research materials can prove to be a significant part of our cultural heritage and become resources for historical as well as contemporary research. CORTI and THOMPSON (2004) describe the general availability of qualitative data sources around the world, and discuss local and national local archival initiatives arising over the past decade. Other than the Murray Research Centre: a Centre for the Study of Lives archive (Harvard University, US), described in detail by Jacqueline JAMES and Annemete SORENSEN (2000)[1], ESDS Qualidata represents the biggest government-supported national data archive for qualitative data. [14]

In the mid 1990s, the UK centre pioneered systematic procedures for archiving and disseminating qualitative data within a meaningful international social science framework, rather than using purely historical archival practises. The procedures included: sorting, processing and listing both raw data and accompanying documentation (metadata); systematically describing studies for web-based resource discovery systems; establishing appropriate ethical frameworks and mechanisms of access; and training in the re-use of qualitative data (CORTI 2000, 2002). By 2005, Qualidata has acquired, processed and catalogued over

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1   The Murray Research Centre, founded in 1976, is a national repository for social and behavioural science data focusing on human development and social change, with special emphasis on the lives of American women (JAMES & SORENSON 2000). The archive holds a large collection of studies, often including include in-depth interviews or surveys with open-ended questions. The Center holds an important collection of longitudinal studies of mental health, including Sheldon GLUECK and Eleanor GLUECK's (1968) *Crime Causation Study*, some material from the Institute of Human Development, and Lewis TERMAN's (1954) *Life Cycle Study of Children of High Ability*. In the area of racial and ethnic diversity, an important study is Ann BRUNSWICK's (1980) *Harlem Longitudinal Study*.

one hundred and forty datasets, and catalogued a further one hundred and fifty already housed in archives across the UK. Surviving "classic studies" data from key researchers were also rescued, including well-known British projects such as: Elizabeth BOTT's study on *Family and Social Network* (1956); John GOLDTHORPE et al.'s *The Affluent Worker* (1962); Stanley COHEN's *Folk Devils and Moral Panics* (1967); the entire life's work of pioneering UK researchers such as Peter TOWNSEND's *Family Life of Old People* (1955), *The Last Refuge* (1962) and *Poverty in the UK* (TOWNSEND, 1979); and Paul THOMPSON's life-history interview studies of *The Edwardians* (1975) and *Families, Social Mobility and Ageing, an Intergenerational Approach* (1993). THOMPSON and CORTI (2004) provide an introduction to selection of talks by the some of these leading pioneers of UK social research given at a symposium in 2000. [15]

The accumulation of documented and available qualitative data resources has thus encouraged the take-up of secondary analysis. Greater re-use of data also reflects some of the efforts invested in promoting or re-packaging data collections to meet researchers', teachers' and students' needs. And, as resources grow and the promotional machines grind into action, so experiences of secondary research have begun to find their place in social research literature, as the reflections in this *FQS* Special Issue on Secondary Analysis of Qualitative Data testify (CORTI, WITZEL & BISHOP 2005a) [16]

4. The Potential of Data for Secondary Analysis

Thus, archived qualitative data exist to be re-used, revisited, reanalysed and compared with complimentary data sources. There is a well-established tradition in social science of reanalysing quantitative data. However, among qualitative researchers, to date, there has been is no similar research culture that actively encourages new researchers or students in the social sciences to conduct reanalysis of data collected by other researchers. Until very recently there has been a distinct lack of public discussion of the issues involved and very little published "evidence" of the benefits and limitations of such an approach. [17]

The re-use of qualitative data provides an opportunity to study the raw materials of recent or earlier research to gain both methodological and substantive insights. Because new data are typically expensive to collect, using existing sources will save costs as well as avoiding any duplication of research effort. The ways that qualitative data can be re-used are not dissimilar from those familiar for the secondary analysis of survey data, yet there are different and perhaps more challenging intellectual, epistemological and practical problems for the user to consider. CORTI and THOMPSON (2004) have already identified six approaches to re-using data which are described in relation both to theoretical issues raised more recently about re-analysis, and to the actual experiences of researchers[2].

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2   In 1999 Qualidata conducted a national survey of academics and researchers to ascertain what kind of data resources researchers wanted to access. 92% of the 500 who responded highlighted digital data in accessible formats that could be useful for both research and teaching purposes. Data in the area of health, criminology and social policy were found to be desirable (CORTI & THOMPSON 2000).

The authors also explore in depth the methodological, ethical and theoretical considerations relating to the secondary analysis of such qualitative data. Authors in recent years have begun to write on this topic (authors in recent five years have begun to write on this topic (see CORTI & THOMPSON 2004; CORTI THOMPSON & FINK 2004; HEATON 2004, HAMMERSLEY 2000; CORTI 2000; FIELDING 2000; THOMPSON 1998; SZABO & STRANG 1997). [18]

The main arguments that point out some of the possibilities and limits of secondary analysis will not be repeated here, but before we discuss strategies in teaching secondary analysis of qualitative data, we first recap the ways that CORTI and THOMPSON (2004) consider that data can and have be re-used. Indeed, each practical example of re-use that we describe can be used in teaching itself, to provide an overview of this research strategy. [19]

4.1 Description

The possibilities for using data descriptively are extensive, encompassing both the contemporary and historical attitudes and behaviour of individuals, groups and organisations, or societies. Indeed, significant data created now will in time become a potential historical resource. The oral testimonies of ordinary men and women can complement official and public sources such as newspapers and government reports, and such evidence can also be used to document individual lives from a biographical perspective, including those of significant researchers themselves. SHERIDAN (2000) notes how Mass Observation material has been used not only to provide historical evidence, but also to examine the role of the Mass Observation study itself in the social, political and cultural milieu of the 1930s and 1940s. Historical research methods will thus become important here, and re-use of these materials will require the new investigator to first evaluate the evidence, examine its provenance, and assess the veracity of the sources. This may be a new practice for contemporary social researchers. [20]

4.2 Comparative research, restudy or follow-up study

Qualitative data can be compared with other data sources or be used to provide comparison with other contexts, over other periods of time, and across other social groups and cultures. In Britain the original returns of the population census were kept as public records and have proved an invaluable basis for consultation in recent years Sidney and Beatrice WEBB (1984), on completing their pioneering study of British trade unionism, archived their field notes from their national sample of interviews, which still feature as the principal source of information on trade unionism in the late 19th century. Equally well known early classic restudies include Seebohm ROWNTREE's (1901) repeated surveys of poverty in York and Hubert Llewellyn SMITH's (1930-5) repeat of Charles BOOTH's (1891-1902) poverty survey in London. In anthropology a classic example is the controversial restudy and reinterpretation by Oscar LEWIS (1963) of Robert REDFIELD's (1930) research on the village of Tepotzlan in Mexico. [21]

Comparison brings greater power to answer research questions, for example when a dataset can be combined with data beyond its own sample or geographical limitations. Equally, samples from original studies that have been preserved can be followed up, typically with the involvement of the original investigator, and sometimes with new ethical approval. An example is Glen ELDERS's *Children of the Great Depression* (1974), based on both new fieldwork and a reorganisation of the earlier interviews and participant observant of the Berkeley and Oakland cohorts interviewed on a regular basis since the 1920s, archived by the Murray Research Centre. [22]

4.3 Re-analysis or secondary analysis

Reanalysing qualitative data allows both for re-interpretations and also for new questions to be asked of the data. Julie CHARLESWORTH and Janet FINK (1999) draw upon original research data from Peter TOWNSEND's study of institutional care published as *The Last Refuge* (TOWNSEND 1957), to illustrate the potential which this archived data holds for the analysis of such topics related to workplace and organisational dynamics[3]. Alternatively, new angles can be applied and new methods employed which may not have been possible at the time of the original data analysis. Sometimes new analytical tools can highlight parts of data that were previously ignored in the original analysis, offering the chance to revisit and reanalyze material, even if already written up (ÅKERSTROM, JACCOBSON & WASTERFORS 2004). Typically, the richer the original research material, the more potential there is for further exploitation. [23]

Nigel FIELDING and Jane FIELDING (2000) revisited Stan COHEN and Laurie TAYLOR's (1972) original analysis of long-term imprisonment of men in maximum security published as *Psychological Survival*[4]. Their restudy highlights the value of secondary analysis in addressing sensitive topics or hard to reach populations, by extracting the maximum value from those studies which are able to negotiate access. [24]

In the US, research using the Murray Research Centre data collection demonstrates the ways that qualitative data can be restructured for new research, for example creating new prospective studies out of existing ones and combining multiple data sets for multi-cohort designs. Jacqueline JAMES and Anemette SORENSEN (2000) discuss how the original transcripts of in-depth interviews, observations, and responses to tests, can be especially valuable in applying different perspectives and renewed scoring procedures to the original data. [25]

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3 This study is archived at the National Social Policy and Social Change Archive at the University of Essex, referenced as UKDA study number, SN 4750, The Last Refuge, 1958-1959. Information about the collections can be accessed via the web site http://www.data-archive.ac.uk/search/searchStart.asp.

4 This study is archived at the Radzinowicz Library of Criminology at the University of Cambridge, referenced as UKDA study number, SN 4881, Effects of Long-term Imprisonment, 1966-1975. Information about the collections can be accessed via the web site http://www.data-archive.ac.uk/search/searchStart.asp.

4.4 Research design and methodological advancement

A study of the research methods of an original research investigation, such as the sampling methods, data collection and fieldwork strategies and interview guides of earlier research can help in the design of a new study or the development a methodology or research tool. Paul THOMPSON reflects on the role of drawing on existing interview guides designed by earlier researchers in a similar field (SAVAGE 2005; CORTI & THOMPSON 2004; THOMPSON 2000). [26]

There is a growing emphasis on publishing methodological details in reports, and books, but all too often the details offered are frustratingly brief and sanitised. One of ESDS Qualidata's roles, as we shall see later, is to try to encourage and devise better strategies for capturing the methodological perspectives and details under which studies are undertaken (across at all stages) thereby providing greater context for a secondary user who may be unfamiliar with a set of raw data. Researchers' own research notes and fieldwork writings can offer much insight into the history and development of the research and also help inform new thinking. [27]

4.5 Verification

Archived data can be scrutinized with scientific rigour to support or challenge a set of findings or to appraise the method. The practice of opening data for inspection is becoming increasingly important in the natural sciences, with the aim of encouraging more transparent research. We have also seen in the UK the recent start up of training in master classes on verification in the field of quantitative economics, the "Replication Workshop—Estimating Time-Series-Cross-Section Models with Comparative Political Economy Data" (ESRC Oxford Spring School). This initiative is funded through the ESRC Research Methods Programme, which has a strong training component aiming to improve the standards of research methods across the UK social science (RMP Website). [28]

Martin HAMMERSLEY (1997) discusses the benefits and weaknesses of using "replication" to check findings, arguing that true scientific replication is not possible as studies generally do not have equal social phenomena. Restudies suffer from differences in time and the researchers' subjective perspectives, but well-documented data sets can help the new investigator to reconstruct the evidence by re-tracing the original analytic steps. [29]

HAMMERSLEY (1997) and others correctly argue that replication is not an appropriate objective for secondary analysis, partly because of the problem of context. The loss of the holistic context of a study means that it is unlikely that the research process could ever be made fully explicit—the path of qualitative analysis is never linear, and almost always involves a degree of trial and error in the pursuit of interesting lines of investigation. Retention of the original coding frames and analytic notes means that these can be reapplied by another investigator. Nigel FIELDING (2000) further suggests that qualitative software

may help the process of verification. We discuss the use of CAQDAS software in the teaching of secondary analysis later on in this paper. [30]

5. Strategies in Teaching Secondary Analysis of Qualitative Data

5.1 The literature?

We have seen that there has been very little published in the research arena on issues relating to the practice of secondary analysis of qualitative data, and this also applies to textbooks and the student market. While there is an ever-growing number of published texts describing different styles of qualitative interviewing (e.g. BURGESS 1982), there are fewer on how to analyse and interpret interview material (PLUMMER 1983; SILVERMAN 2000). So where does the scholar or teacher turn for the reading lists? We argue that as for survey methods, we will see the rise of texts and readers on guidance on both theoretical and practical approaches to these methods. Methodological handbooks need to add sections on such approaches in addition to the guidance on research design and fieldwork practice, methods of and tools for analysis and writing up. We have seen the rise of such readers since 2002, which have actively begun to appraise the secondary analysis of qualitative data (SEALE et al. 2004; HEATON 2004; CASSELL & SYMONDS 2004; LEWIS-BECK et al. 2003) As these increase in number, so the potential for take-up of this practice among standard methods courses and for student projects should grow. [31]

5.2 The benefits for students of using data from classic studies

The use of real-life data in teaching adds interest and relevance to courses, and, if the data are updated on a regular basis, ensures that the courses are pertinent to current issues. Students who gain their experience of data analysis from the use of specially constructed data rarely have a good understanding of the complexity of data analysis in the "real" world. Students also have the opportunity to understand the rationale for collecting data and can develop the skills and intuition required to evaluate the strengths and weaknesses of particular research strategies and fieldwork methods. Data of particular relevance to the subject being taught can thus help engage the student faced with sometimes confusing substantive subject matter and methodological theory. This is an especially rich experience when access to the main publications resulting from the data is provided. [32]

Increasingly, the value of data documentation is being recognised as a resource in its own right, and it can be used to train students in data collection methods and to provide model studies which the students might copy or adapt. For example, it might be feasible to involve students in conducting their own small interviewing project and then comparing their results with a set of interviews that has been archived. By using the data directly, students gain a good appreciation of the limitations and variations amongst different data collection and analysis techniques. Data can be used to teach about various methodological issues: sampling design, representativeness, topic guide construction, more vs. less

structured questioning techniques, coding systems, and transcription techniques revealed by comparing a transcript with the audio tape from an interview. [33]

Evidence from ESDS Qualidata suggests that older "classic" studies in the social sciences can provide extremely valuable material for social science teaching, both in research methods and in substantive areas. Students can learn many fundamental aspects of qualitative research, and the theoretical and methodological strategies that helped to create these well-known datasets, while also gaining first-hand experience of critically re-examining original source material. Learning about the work of researchers who have made a significant impact in their field allows young researchers to take the best practice elements from this work and further develop them in their own research work (ZEITLYN 2000). [34]

A good example of the learning potential of such datasets is provided by the Katharine Buildings study undertaken by Peter TOWNSEND in the late 1950s, and now archived by ESDS Qualidata[5]. This unpublished study of social change is itself a re-study. It focused on the inhabitants of the Katharine Buildings in Stepney, London, established in 1885 as an experiment in improving working-class housing conditions. Townsend's study includes his analysis of the original ledgers and notes kept by the managers of the Buildings, archived at LSE, who included the young Beatrice POTTER (nee WEBB), and his own interviews with residents, some of whom were descendants of the original inhabitants. The questionnaires, with many open-ended questions, provide a unique picture of a working class community in transition. Using these materials in a learning environment, students can examine data collected using sociological and anthropological research methods, and can compare these with earlier historical data collected in the late nineteenth century. Training exercises can take up aspects of long-term social change, such as the kinship patterns recorded in both TOWNSEND's interview material, questionnaires and notes, and WEBB's detailed notes on the tenants (Qualidata 1999). Students can also be encouraged to examine the methods used and the research outcomes, and to consider whether they would approach the research differently. [35]

5.3 Student skills in undertaking secondary analysis

When considering how to encourage the uptake of secondary analysis in teaching as a valid technique, students need to be aware that secondary analysis is dependent on a number of limiting factors. Some barriers noted by CORTI and THOMSPON (2004) are: the problem of the implicit nature of qualitative data collection and analysis, context and reflexivity; the lack of time to get fully acquainted with research materials created by someone else; possible constraints imposed by the original informed consent agreements; original researchers' discomfort with the exposure of their research practice; issues

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5 This study is archived at the National Social Policy and Social Change Archive at the University of Essex, referenced as UKDA study number, SN 4756, Katharine Buildings, 1885-1962. Information about the collections can be accessed via the web site http://www.data-archive.ac.uk/search/searchStart.asp.

concerning intellectual property rights or threat of misinterpretation; and lack of a large enough publicly available stock of research data to meet the specific needs of a researcher's inquiry. [36]

Thus the student approaching secondary analysis must first consider these factors:

*   what data are available to suit research needs;
*   data access and restriction policies;
*   data formats available—text or original audio recordings;
*   the amount of contextual documentation available;
*   the time available to get to know data well; and
*   the analytic skills required to confront the data in a rigorous manner. [37]

It is clear then that there are also some basic prerequisites that come into play when undertaking secondary analysis, that reflect these factors. These include having:

*   a rich and diverse stock of quality data sources free from excessive restrictions;
*   access to original sources where possible, e.g. tape recordings or full transcriptions;
*   access to contextualising material e.g. online catalogues, lists, methodology etc.;
*   a solid foundation in "primary" data analysis;
*   rudimentary skills in computer assisted qualitative data analysis software (not essential, but useful);
*   adequate time to engage in the project. [38]

The first three cover matters that are largely beyond the control of the research student. [39]

Fortunately in the UK, the stock of qualitative data is increasing and at the time of writing there are just under 200 qualitative studies recorded in the UKDA catalogue, with some sixty available directly from the UK Data Archive in digital web-download format. Unfortunately, many do not have the original audio-recordings, but the transcripts are of high quality and are typically accompanied by a catalogue record and an online user guide in Adobe PDF format that contains the end of award report and details about the study methods. [40]

The last three points cover matters to do with a student's own capacity for undertaking high quality and rigorous research. The training capacity for qualitative methods is still limited, but new funded initiatives are coming on stream, that aim to redress the failure of the UK educational system to train well in research methods. The Research Methods Programme alluded to earlier is such an initiative that is proving to be highly successful in getting qualified

instructors to provide cost-effective methods training across the methodological spectrum. As secondary analysis is now being recognised in mainstream research agendas, mainly because of the significant Research Council investment in the ESDS infrastructure in the UK, and because research projects being funded are utilising this method, we expect to see a greater push for studentships to work in this area. [41]

6. ESDS Qualidata Strategies for Teaching

During the past ten years ESDS Qualidata has initiated strategies and activities that aim to promote the use of archived qualitative data and associated study materials in teaching and learning and in introducing methods of secondary analysis. From the remit of ESDS Qualidata, these have been conducted with a promotional angle, rather than an overtly pedagogic one, but we have liased with teachers who have requested archived materials for use in their own teaching, for example, in research methods courses. [42]

There are three strategies that we consider to be most effective. These are: providing quick and easy access to data and study documentation; providing detailed user guides for qualitative studies; running an outreach and training programme; and publishing information and web content. We discuss each in turn. [43]

6.1 Quick and easy access to data and study documentation

In the era of a consumer's market and e-commerce, even researchers want everything at the click of a mouse. Time is precious, a pressurizing research assessment culture is pervasive and funds are tight. This means that researchers do not have the luxury of time to hunt down sources of data hidden away in paper archives and then spend two weeks reading in natural light-free rooms. They want digital data to download to their desktop, possibly into their favourite software package. As a 21st century forward-looking data service, ESDS is committed to providing quick and easy access to digital data via the web. Researchers, students and teachers from all fields and types of organisations may register with ESDS to obtain data, largely cost-free. Some qualitative data may have restrictions on access, for example, commercial usage may be restricted, permission may be required from the depositor, or publications may need to be vetted by the sponsoring organisation. ESDS runs a one-stop centralised registration system that uses ATHENS (for local UK Higher Education) authentication. [44]

Qualitative data are easily located. ESDS offers a resource discovery hub via the UKDA catalogue record, enabling users to locate digital data held at Essex or accessible sources of qualitative data held at other secure archives across the UK. ESDS creates comprehensive metadata (data describing data) for all datasets it acquires and disseminates. For each dataset this includes: a catalogue record created according to international standard conventions (DATA DOCUMENTATION INITIATIVE) for describing social science data; a user guide

distributed in Portable Document Format (PDF) and bookmarked for easy navigation; and a bibliographic citation for the study to promote and facilitate good citation practice. The catalogue record can be consulted to find out: who sponsored the study; who deposited the data; coverage (dates, country, regions etc); sampling and data collection methodology; and what data are available to the user. There is also a bibliography of publications which have been produced by the principal investigators. All documentation files are placed online for instant access and download and are made accessible to both registered and unregistered users. ESDS ensures that every dataset is accompanied by adequate documentation to ensure informed use of the data. The content of online documentation varies from study to study but for qualitative study data usually consists of a bookmarked PDF User Guide containing background details of the study and research methods, including original instruments e.g. end of award report, topic guides and coding information and so on. A Data List also accompanies all qualitative data collections, which is an important part of the metadata that generally includes basic interviewee biographical details and an indication of length and file names of transcripts. The Data List provides greater details of the sample which may not be immediately obvious in the catalogue record. It can also help users to identify individual transcripts most relevant to their research. Finally, a Read File is also supplied that provides important user information about the processing procedures carried out by the UK Data Archive together with specific information pertinent to using the data collection. [45]

These pieces of information rely on a study being well documented and contextualised, but ESDS Qualidata has taken steps to create enhanced user guides for its most popular and well-used collections, which we describe in the next section. [46]

Most modern research is deposited with ESDS in machine-readable, digital formats such as Word or RTF files. Where there are no access restrictions these are available online through the UKDA instant web-download service. Older research has generally been deposited in paper format. Some of the key sociological classic studies mentioned above are stored in the specialist ESDS Qualidata archive, the National Social Policy and Social Change Archive at The Albert Sloman Library, University of Essex. The collections are available to registered users who make a personal visit to ESDS Qualidata, but steps have been taken over the past three years to make parts of these digitally accessible. Digital samplers of classic sociology collections offer the teacher and student an ideal place to begin their exploration of a secondary analysis of this incredibly rich resource. [47]

ESDS Qualidata has also taken the initiative to develop more flexible access to digital qualitative data via real-time online browsing of data. The [Qualidata Online System](#) has helped facilitate access to key qualitative collections using XML standards and tools. The system supports more powerful resource discovery and offers greater scope for searching and browsing content of data (supplementary to higher level study-related metadata). Since users can search and explore (textual) content across different datasets directly, data can be retrieved

immediately. The advantages are that a system based on common standards provides access to qualitative data via a common interface using a standard web browser (see Figure 1). The online system is still in the development phase and the site is being expanded to cover data collections in addition to The Edwardians interviews (THOMPSON 2000a)[6]. Depending on the dataset, various combinations of interview transcripts, interview summaries, methodology and background materials are available to browse and search (see Figure 2). In-house data processing ensures that the interview data have been fully anonymised, are in the appropriate digital format, follow a standard layout, follow transcription guidelines have speakers tags assigned, and that interviews and other content have structured mark-up using XML.

Figure 1: Screen shot from the ESDS Qualidata Online Site—search screen. Please click here for an increased version of Figure 1.

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6   This study is archived at the National Social Policy and Social Change Archive at the University of Essex, referenced as UKDA study number, SN 2000, Family Life and Work Experience Before 1918, 1870-1973. Information about the collections can be accessed via the web site http://www.data-archive.ac.uk/search/searchStart.asp.
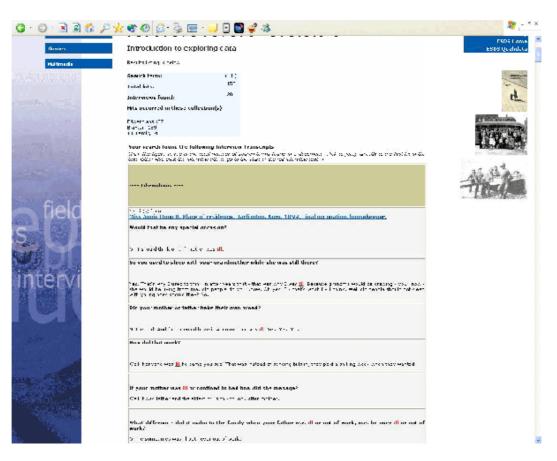
Figure 2: Screen shot from the ESDS Qualidata Online Site—a retrieval. Please click here for an increased version of Figure 2. [48]

6.2 Detailed user guides for archived qualitative studies

ESDS Qualidata adds value to data for the research, learning and teaching communities by enhancing user-oriented information about data to provide a better understanding of the study and research methods and by allowing users to browse the content before they decide to acquire the data. These enhanced user guides may include samplers that provide highlights of key qualitative materials to illustrate the potential of the collection for research and teaching. Relevant materials are compiled and made available in PDF format to browse and download. The extent of enhancement varies greatly as it depends both on the nature of the collection (complexity of the methodology, for example) and on the materials available from depositors of the collections. ESDS Qualidata is focusing on materials that reveal both the context and the process of the original research. Content that enriches context or explains in detail how the original research was actually done is extremely valuable to researchers embarking on secondary analysis. [49]

Examples from two studies illustrate the diversity of user guide materials that can be especially informative for conducting secondary analysis. For one recently

released study, Mildred BLAXTER's Mothers and Daughters[7], customised materials were prepared. Extracts of an interview with Professor BLAXTER covered topics such as how she funded the study, how she created the study design, and how she analysed large quantities of qualitative data. Extracts from her book that describe methods and sampling were also included. Finally, a brief Scots dialect glossary was prepared to help researchers translate terminology that appears in these interviews, all with Scottish grandmothers. A second user guide, for Dennis MARSDEN's Mothers Alone (not yet published collection), includes an example of the original letter he sent to prospective participants requesting their involvement and assuring their confidentiality, a glossary of terms relating to poverty and income, and a raw data extract of a very richly described incident from his fieldwork that he was not able in include in any published versions of the research.
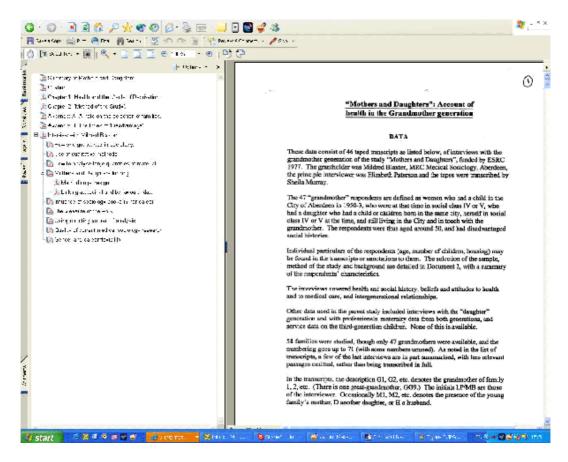

Figure 3: Bookmarked user guide from BLAXTER's Mothers and Daughters collection. Please click here for an increased version of Figure 3. [50]

Of course, the most valuable material for researchers embarking on secondary analysis usually relates to the methodology of the original study. One approach to secondary analysis (described above) involves applying different approaches or frameworks to the same data. In the case of the Mildred BLAXTER collection

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7   This study is archived at the National Social Policy and Social Change Archive at the University of Essex, referenced as UKDA study number, SN4943, Mothers and Daughters, 1945-1978. Information about the collections can be accessed via the web site http://www.data-archive.ac.uk/search/searchStart.asp.

(BLAXTER & PATTERSON 1982), the user guide provides a brief but very useful passage from an interview with the primary researcher in which she described the frameworks she applied to her original project. Clearly such information is useful both for providing context and interpreting the original project. It could also be useful to a secondary researcher who might be considering applying very different frameworks to the same data.

> PT: I'm wondering how you handled all this diverse information, to get that interpretation?
>
> MB: Well, I had some frameworks, of course, of what I had initially suggested were the available frameworks into which people could fit. There are frameworks of medical practice, and rehabilitation services practice, and law, and social work practice, and welfare benefits and so on, there are all these frameworks, all these labels available. So that gives you an initial framework, of approaching the way people talk of their condition, in medical terms, to see how it fits into the medical framework, or how it fits into these other frameworks. So that gives you a framework to start with, for analysis. (Interview of Mildred BLAXTER with Paul THOMPSON 2003) [51]

Libby BISHOP provides an example of applying a new framework to her restudy of data on the topic of processed food (BISHOP forthcoming). This paper uses secondary analysis of qualitative data to explore historical shifts in consumption of, and attitudes toward, processed food. The paper both uses and critiques secondary analysis. It tests the viability of secondary analysis where the primary data were not collected with the questions of the secondary project in mind. BLAXTER's data will provide one source for the project. However, BLAXTER herself has already done one re-analysis of her data regarding health effects of food consumption (BLAXTER 1983). The current project will attempt to extend the analysis both by applying a different research framework—using processed food as a case study of commoditisation—and by developing comparisons with other data collections. [52]

6.3 Teaching datasets and learning resources

Creating and delivering more visible and packaged online electronic resources is a key way to facilitate both the usage of data and training in methodological skills among students. In order for these products to be of most benefit, they need to be accompanied by substantive and methodological commentary on the project and data, hands-on exercises, the availability of face-to-face training, and finally continuing individual support. [53]

ESDS Qualidata remains highly receptive towards approaches from users who require data for teaching. Bespoke sets of interviews have been prepared on demand for teachers on a variety of courses: introductions to CAQDAS packages; oral history; discourse analysis; and general research methods courses. From 1996 onwards, ESDS Qualidata produced a number of teaching packs in bound paper format that were effectively precursors of the more recent

enhanced user guides and ESDS Qualidata Online web content described above, These were based on individual data collections including Paul THOMPSON's Edwardians collection and Peter TOWNSEND's *The Last Refuge*. They described the study methods, gave examples of data and published outputs from the research, and presented ways of re-using the data collections. The packs were well-regarded and comparatively widely used in teaching. [54]

Of course, these materials are best achieved through collaboratively funded initiatives. The UKDA already has experience in this task in relation to both TRAMSS and the JISC Virtual Tutorial Suite and seeks to build closer links with other training initiatives in the social sciences, such the recent UK ESRC's Research Methods Programme. [55]

6.4 Publishing information and web content

A wide range of dissemination and outreach activities undertaken by ESDS Qualidata provide support for, and awareness of, the potential of qualitative data. In addition to the training already mentioned, the most important promotional media is the web, key newsletters and also journals. ESDS Qualidata has its own website, which is of part of a suite of pages making up the ESDS site. The content includes: regularly updated data, development, news and events web pages; a section on re-using data; and extensive guidance on creating and depositing data. The section on re-use provides: an overview of ways of re-using data; an FAQ on re-use; and is regularly updated, with a bibliography of articles addressing re-use and case studies of re-use including reflections and commentary (e.g. this FQS edition). [56]

ESDS Qualidata contributes to the regular ESDS Newsletter, UKDatabytes which has a circulation of some 3500 and which highlights new data collections, recent developments in data services and training opportunities. The ESDS Qualidata team also publish in other newsletters and journals where time permits, but academic output is not a specific remit of ESDS, though it is always desirable. Louise CORTI, Director of ESDS Qualidata co-edited the special edition of *FQS* in 2000, which was the first official journal outlet to have a set of papers specifically addressing the issues surrounding qualitative data archiving and secondary analysis (MRUCK, CORTI, KLUGE & OPITZ 2000). These papers are the first to be used and cited in the field and, like this edition, will become part of the general literature for training in social research methods. Finally, it is useful to make an appearance in newsletters and journals which will reach the teachers and student populations. Many disciplines in the UK, such as sociology, have their own student journal that is read by post-graduates and distributed free to departments. A feature in this kind of outlet, with exemplars of enticing material, can pay off. [57]

6.5 Outreach and training programme

While published information can help students to confront data, it is evident that students are demanding users. ESDS Qualidata provides a dedicated help desk facility, regularly updated web pages and FAQs, and an email discussion list as a forum to host debates on issues arising in the use of qualitative data. It is hoped that this will facilitate teachers and students to enquire proactively and discuss data sources and ideas for using data in teaching. However, that said, many of the queries tracked by ESDS Qualidata can be highly resource intensive in terms of support staff time. For example, postgraduates might ask very specific questions, that often reflect the title of their thesis, for example, "what analyses would I have to undertake to measure gender inequalities in health?" At best support officers can direct them to relevant sources of data and suggest types of analytic strategies, but are briefed to refer demanding students back to their tutors, or to advise them to sign up for training. Louise CORTI (2004) provides a discussion of user support requirements necessary to run a qualitative data archiving and dissemination service. [58]

ESDS Qualidata's programme of training events and activities aims to enhance the methodological and substantive understanding, and secondary analytical potential, of archived qualitative data sources. These include: awareness and introductory days; tailored user and "data confrontation" workshops; thematic events, by discipline or method; secondary analysis of existing sources; exploration of data sources and data browsing systems; and using CAQDAS software. "Training the trainers" events are also a good way to support teachers. These are aimed at social science lecturers with a remit to teach methods or substantive courses. ESDS Qualidata also provides specialist support and support for creators and depositors of qualitative data, especially ESRC award holders, where break-out groups are used, following a series of formal presentations on best practice in research and data management and documentation, to discuss matters of relevance to researchers and students. This can also be viewed as a form of training, guiding both experienced and new researchers in best practice for creating and preparing data for longer-term sharing, and enabling greater consideration and exploration of some of the key issues. [59]

To give an example of training, ESDS runs a programme of roadshows that take the form of hands-on workshops around the UK aimed at providing participants with the opportunity to explore how archived data sources held by ESDS can be used in research, teaching and learning. One of the exercises focuses on using the ESDS Qualidata Online system to explore the Edwardians collection, mentioned above. Through the immersion in this rich data collection, students get to consider the potential and power of archived audio-visual data to apply to their own research questions. A recent workshop held on "Secondary analysis of qualitative data: using Atlas.ti to explore archived sources" held in the summer of 2004 was also highly popular. It is interesting to note that all forms of training run by ESDS Qualidata are always fully booked, suggesting that the supply cannot

even begin to meet the demand. We now provide an overview of this workshop of the Atlas.ti workshop. [60]

6.5.1 Teaching secondary analysis through Atlas.ti training

The June 2004 workshop introduced participants to the re-use of qualitative data using Atlas.ti, a software tool for managing qualitative data. The morning session addressed best practices in data creation and documentation to enable re-use, covering guidance on transcription, anonymisation and data formats. Participants were introduced to ESDS Qualidata archived datasets and techniques for doing secondary analysis. They learned how to explore and rework data by doing a self-paced hands-on exercise that guided them through search, browse, download and other functionality of ESDS catalogues. The remaining sessions, in a computer lab with hands-on guides, incorporated Atlas.ti for data analysis. [61]

There is a basic challenge whenever offering a hands-on workshop on secondary analysis. It is not, of course, essential to conduct such a workshop using CAQDAS (computer assisted qualitative data analysis software). However, the ease of data manipulation and the fact that such tools are (slowly) becoming more prevalent in qualitative research, argues for using software in training workshops. However, this requires ESDS to either restrict workshops to experienced users, which we feel is too exclusionary, or offer training in the tool as part of the workshop. We've opted for the latter approach; this is not optimal as it requires a significant time investment to acquire basic software facility, and the task of learning both the software and the methods of secondary analysis in one day is very intensive. While the workshop evaluations were positive, we are exploring alternatives. [62]

The group started with a basic introduction to the Atlas.ti software covering coding, search and retrieve, and annotation. These are the basic skills of data management for primary analysis as well. For doing secondary analysis, the workshop addressed additional functionality. One of the simplest approaches to secondary analysis is to use the raw data to pose research questions different from those of the primary research. The process of coding (see Figure 4) is identical to the procedure in primary research except for the fact that the researcher is less familiar with the data as he or she didn't conduct the original interviews. This lack of familiarity makes coding proceed more slowly. However, it can also cause the researcher to read very closely and carefully, sometimes more carefully than she would when she feels she already "knows" the data.
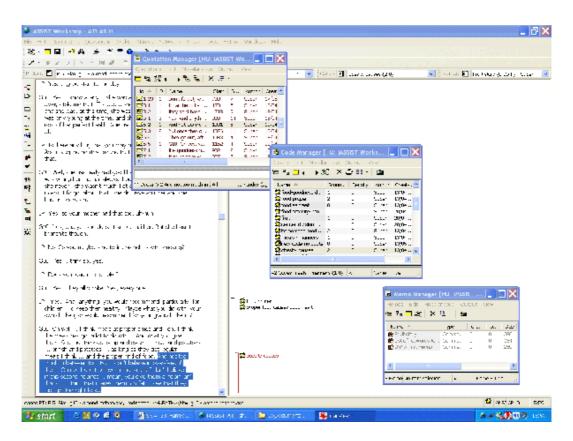
Figure 4: Screen shot showing basic quotation, coding and memo features of Atlas.ti.
Please click here for an increased version of Figure 4. [63]

A second common technique for secondary analysis involves manipulating sub-
groups of the original data. There are many variations on this theme. First, the
entire original data set could be considered a subgroup, and compared with new,
primary data. Alternatively, the original data could be subdivided and made
suitable for various types of comparative analysis. For example, the *Mothers
Alone* collection includes mothers who were never married, separated, divorced,
or widowed[8]. Although MARSDEN addressed these distinctions in his research,
one possibility for secondary analysis might be to explore inter-group
comparisons in far greater detail. In this workshop, participants learned some
techniques for re-analysis, such as using "families" in Atlas.ti to generate
analytical sub-samples. The "families" function in Atlas.ti is a way of creating
groups (see Figure 5). This can be groups of documents (e.g. interviews) or
codes. In this instance, once the interviews were loaded into Atlas.ti, each group
could be assigned to a separate Family. The software then enables easy
comparisons across groupings. Again, similar procedures are used in primary
analysis. In the workshop, we combined extracts from several different data
collections, making coding and comparisons possible across datasets. We
demonstrated that data not previously accessible for computer-based re-analysis

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8   This study is archived at the National Social Policy and Social Change Archive at the University
    of Essex, referenced as UKDA study number, SN5072, Mothers Alone, 1955-1966..Information
    about the collections can be accessed via the web site http://www.data-
    archive.ac.uk/search/searchStart.asp. Information about the collections can be accessed via the
    web site http://www.data-archive.ac.uk/search/searchStart.asp.

(because it existed in only paper format), combined with CAQDAS tools, enabled an innovative application of secondary analysis.
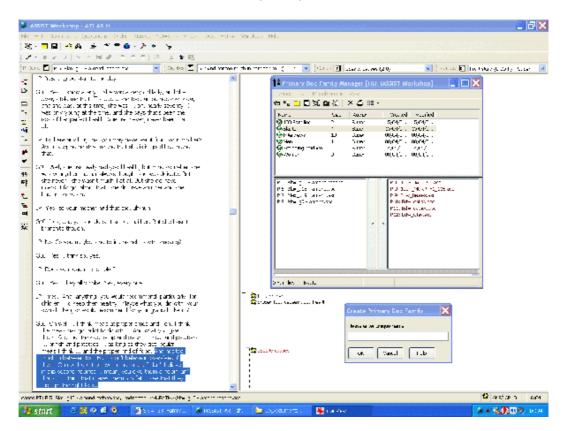

Figure 5: Screen shot showing Atlas.ti features for grouping ("families" and "filtering"). Please click here for an increased version of Figure 5. [64]

The message coming out of this and other workshops was clear. There is still a lower than desirable level of awareness of the availability of, and potential for, utilising real social science data sources in research, learning and teaching. Many researchers still think very narrowly about secondary analysis (e.g. replication only) and were appreciative of learning about more diverse ways of re-using archived qualitative data. [65]

In order to add value and share the training resources arising out of these workshops, ESDS Qualidata endeavours to produce online training materials. However, these aim to reflect the content delivered in a basic way, rather than being produced as more costly integrated multimedia tutorials. A good way of promoting these resources and hence methods of secondary analysis is to encourage teachers to participate in evaluating the resources. [66]

7. Conclusion

We are in a period of cultural change within social research, where value for money, accountability and finding out what people really think, (i.e. qualitative research) now feature on most academic and policy research agendas. It is vital that the secondary analysis of qualitative data is integrated into the core research methods curriculum as a matter of course, so that the next generation of students is fully equipped to make full use of the megabytes of valuable research data that is created every day, much of it from of public spending. ESDS Qualidata is always looking for partnerships with academics and researchers to create new resources for teaching and learning based on either specific data collections or on comparative sources. We are also especially keen to begin working to create materials using data from mixed methods studies. Staff keep close contact with other centres around the world, who are interested in systematically preserving and disseminating qualitative data. [67]

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Libby BISHOP is currently a Manager at ESDS Qualidata where she plans, oversees and coordinates the day-to-day work of the section. She also manages the development of ESDS Qualidata *Online*, especially by selecting collections for enhancement and by writing materials to promote reuse and secondary analysis. She is also helping to develop a framework (DTD), methodology and tools for providing online access to enhanced archived qualitative data resources and has given workshops and conference presentations in these areas. She has over fifteen years experience in qualitative research and research management in academic and non-academic organisations. She has taught sociology, including introductory qualitative methodology. Her current research project uses secondary analysis of several Qualidata collections to explore recent historical shifts in the use and status of processed foods.

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Citation