

Scholarship and Research Based on or Influenced by IQA

As of November 2008

Books

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3. Jones-Kavalier, B and Flannigan, S. The Hiring Game: Reshaping Community College Practices (Ch 6). American Association of Community Colleges, 2008.
4. Northcutt, N and McCoy, D. IQA: A Systems Approach to Qualitative Research Sage 2004.

Journal Articles

1. А.А. ДАВЫДОВ. СИСТЕМНАЯ СОЦИОЛОГИЯ - СОЦИОЛОГИЯ XXI ВЕКА? Davidov, A A. Systems Sociology – A Sociology for the 21st Century? , Russian Academy of Science, Institute of Sociology, 2006.
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2. McCoy, D P. Camber Interactive Multimedia Instruction Organizational Functional Area Assessment, Camber Corporation, Newport News, VA., January 2006
3. McCoy, D P. Law Enforcement Functional Area Analysis. U.S. Army Military Police School, Ft. Leonard Wood, MO. March 2005

4. McCullough, M. and Kassier, E. Identifying, Defining and Managing Social and Economic Change: the Current Capacity and Future Prospects for the Robertson Wine Cooperative. National Agricultural Marketing Council, Pretoria, October 2007
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Reviews

1. Bazeley, P Review in *Qualitative Research Journal* 4, No 4, 2004

In their book *Interactive Qualitative Analysis: A Systems Method for Qualitative Research*, Northcutt and McCoy set out to provide an alternative, application-oriented, logically consistent and rigorous approach to analysis of qualitative data based on dialectical logic and systems theory. Interactive qualitative analysis (IQA) is presented as an alternative to well-established methodologies such as grounded theory and phenomenology, that is, they are seeing it as a new, fully grounded and integrated approach to qualitative analysis, and more than just a set of methods for gathering or working with data (although it is that as well). It had its roots in the TQM movement, but has moved far beyond that.

The book begins with a prologue providing a briefly described (for these authors) case example of the application of IQA to a problem of failing college students, and then outlines how the explanation of the method will proceed. Its initial chapters provide the theoretical rationale for IQA, then remaining chapters clearly outline the procedures to be undertaken.

Ideologically, Northcutt and McCoy place IQA somewhere between postpositivism and constructivism. In striving to strike a balance between these, the authors note that 'dialectical logic is one of the major underpinnings of IQA, which is fanatical only in its opposition to zealotry' (p. 14). They see knowledge and power as largely dependent, the relationship between the observer and the observed as interdependent, that both induction and deduction are necessary; they employ both description and theory, and they applaud rigour. Their object of research is 'reality in consciousness'. This adoption of a 'middle ground' puts them at odds with those in particular camps, but will be appealing to many who have a more pragmatic orientation to research.

Systems thinking lies at the heart of IQA, and every issue the authors touch on (including IQA method itself) is analysed as a system. Any study based on a systems approach will essentially ask three questions:

- What are the components of the system?
- How do these components relate to each other?
- If there are two or more systems (e.g. from different 'constituencies'), then how do these systems compare?

Systems may be linear or recursive. The elements and their relationships can be mapped. The product of an IQA study is a visual representation of a phenomenon prepared according to rigorous and replicable rules for the purpose of achieving complexity, simplicity, comprehensiveness, and interpretability. (p. 41).

An IQA study typically starts with a problem focus. Specific research questions emerge as part of the process of the research, principally through a consideration of the perspectives held by different 'constituencies' (those with an interest in the issue) regarding the research problem. From this point, a rigorously defined procedure is followed to conduct the study. Northcutt and McCoy outline the four stages of an IQA study as follows:

Design phase

- Identify the problem.
- Identify constituencies.
- Identify the issue to be examined by each constituency.
- Consider the three generic questions to be addressed: What are the elements in the

system? How do these elements relate to each other? How do systems compare?
• Do these questions address the current problem? Is it the right problem?

Focus group phase

- Bring together homogeneous groups (i.e. based on constituencies).
- Identify factors relevant to the issue (individuals, silent brainstorming). Record ideas on cards.
- Discuss cards. Participants then sort cards into 'affinities' (common concepts or themes). Initial sorting, then naming and revision are referred to by the authors as inductive then axial coding.
- Identify relationships between all pairs of affinities so as to construct a theoretical code affinity relationship table (ART), leading to the construction of an interrelationship diagram (IRD). Development of propositions about the relationships between affinities is referred to as theoretical coding.
- The IRD is systematically reduced (by removing redundant links) to produce a system influence diagram (SID), a mindmap of influences and outcomes which shows the dynamics of the system. The authors compare this to a structural equation model, with the exception that it can include feedback loops.

Interview phase

- Semistructured interviews are conducted, based on affinities, seeking explanation and expansion and to consider deviant views. Three questions are asked for each affinity: what does this mean? what led to this? and what are the results?
- From these interviews, the researcher constructs first individual SIDs, and then a composite SID, with counts and summary propositional statements recorded on the arrows. The composite SID is compared with the group SID.

Results phase

- Reporting has three goals: to name and describe elements in the system; to explain relationships among elements—system dynamics; and to compare systems (cf. comment on repetition below!).
- The report is grounded in (indeed, almost entirely drawn from) the words of the participants. The dialectical relationship between individual and group perspectives is maintained through comparisons (within and across constituencies).
- Maps are constructed of What is ...? and of What if...?

A 'quick and dirty' analysis of an issue could well be conducted by eliminating Phase 3 (individual interviews). Without the detail of the interviews, however, the system diagram can be far from self-explanatory, and all-important individual perspectives on what is at issue can be lost. Without the interviews, the method is highly reductionist in its procedures, and even with them, is highly structured. The level of repetition and the volume of case study material does make for a rather lengthy book, though the astute reader could well skip significant chunks without losing the plot. Early attention is given to the theoretical basis of the method, and 'theoretical sidebars' are incorporated in the methods chapters throughout the book. While descriptions of method are very straightforward, theoretical chapters and digressions are much less so, especially for the philosophically uninitiated (the authors note that readers can choose to skip the introductory chapters). In the methods sections, even the well-informed reader might need a dictionary handy on occasions, 'segue' being a word used (several times) that had me reaching for my Macquarie. The book is accompanied by a CD which purports to provide full coverage of the primary case study, and electronic copies of the various forms used in the analysis process, for example to reduce an ART to a IRD and then a SID (!). The CD in my copy was either blank or otherwise unable to be read by my computer, however (not

disastrous, as these would be easily recreatable from the multiple examples provided in the book). Other minor annoyances included incorrect details on some diagrams and other (very) occasional proofreading errors (unusual for the US arm of Sage). Interactive qualitative analysis is unlikely to take off as a major new methodology amongst qualitative researchers, but it could well have applicability in applied settings where having the participants undertake the primary analytical tasks (and therefore own the results) would be a particular strength of the method. The method, because of its detailed set of procedures that take most of the responsibility for decision making and analytic thinking out of the hands of the researcher, also has applicability for novice, otherwise too busy, or lacking-in-confidence researchers. The book is complete in itself, no additional instruction would be necessary.

2. *Caulley, D N. Review in Qualitative Research Journal 4: No 1, 2004.*

Excerpt: The authors synthesize ideas from grounded theory, path and factor analysis, quality management theory, Foucauldian concepts of power and knowledge, and systems theory. A dialectical revision of Guba and Lincoln's theory is offered, which, combined with systems theory, offers new insights into the meaning of reliability and validity in qualitative research. Unlike many theoretical works, the book develops the theory into a complete and transparent set of protocols for research design, observation, analysis, and interpretation. The combination of theory and practice suits the book for advanced qualitative research courses across the social sciences, especially those that address epistemology. Professional researchers and evaluators will find this a guide to qualitative analysis.

3. *Dennen, V P. Review in Evaluation and Program Planning 28:3, Aug 2005, pp 315-316*

Excerpt: Interactive Qualitative Analysis (IQA) is an approach toward qualitative research that is systematically built upon an iterative, affinity-building process. In their book entitled *Interactive Qualitative Analysis*, Northcutt and McCoy (2004) explain and promote the use of this method, suggesting that it adds rigor not traditionally found in qualitative research. They further argue that IQA positions qualitative research in a theoretical and epistemological space different from the one it usually occupies. The use of an affinity process to group ideas as a foundational element of the research approach is appealing because it provides a clear procedure to follow and can readily structure a complex and potentially disorderly set of concepts of issues.

Northcutt and McCoy have not invented an entirely new research approach. They have developed a systematic process for conducting qualitative studies that draws upon common data collection practices, such as interviews and focus groups. In doing so, they reference established research frameworks such as grounded theory (Strauss & Corbin, 1998). The book provides a comprehensive look at the IQA method from both theoretical and practical points of view. The authors use the first four chapters to establish background knowledge and a theoretical perspective, discussing such topics as logic, epistemology, research paradigms and systems thinking. The subsequent chapters cover data collection, analysis and representation, and interpretation. Clear examples using real cases are shared throughout, walking the reader through the process and making the IQA approach more vivid and tangible.

There are two significant strengths to the IQA method. First, it seems to be participant-oriented. Participants help refine the research questions and the initial focus group generate and then immediately codes their ideas. Subsequent research participants (in focus groups or interviews) continue to generate and categorize ideas using the previous participants' affinities and codes to guide their thoughts. The issues that are represented in the final report are ideally those that were important to the participants and should not be unduly influenced by the researcher's pre-

determined opinions or biases. Second, IQA provides a clear procedural structure for qualitative researchers to follow. Interactive Qualitative Analysis is a concrete and relatively comprehensible approach in comparison with other less-well specified qualitative approaches.

In closing, this book positions itself as a guide for new researchers with an appropriate tone and level of explanation, but given its departure from conventional qualitative research methods and the rigid systematic procedure presented in IQA it should not be the first or only text a student researcher encounters. The book provides a comprehensive and practical guide to using the Interactive Qualitative Analysis approach as well as solid theoretical grounding for how it fits in the larger conversation or qualitative research approaches. As such, it is a welcome addition to a researcher's bookshelf.

4. Sandelowski, M. *Review in Qualitative Health Research, 15, 719-720.*

Excerpt: Northcutt and Danny McCoy. Thousand Oaks, CA: Sage, 2004.

Interactive Qualitative Analysis features a method for conducting qualitative research based on systems theory. This method directs researchers to represent target phenomena as affinities (i.e., the elements of which these phenomena are composed) and the relationships among them. The primary mode of data collection is the focus group, and the primary rationale for using this method is its operationalization of a “general theory of rigor” (p. xxii), which the authors describe as composed of a system specifying the meaning of and the relationships among ontological, epistemological, and ethical aspects of inquiry. Northcutt and McCoy’s overall purpose for promoting this method is to resolve persistent “disjunctures” (p. xxii) pertaining to the purpose, execution, and validity of qualitative research and to offer researchers a “soft landing” from the rarefied atmosphere of philosophy and theory to the “unforgiving ground” of actual research (p. xxiv).

The book contains many visual displays and a CD-ROM to showcase the “interactive” features of the method and the interactive style the authors see as essential to teaching the method. Indeed, the book is itself intended to exemplify an interactive qualitative analysis of interactive qualitative analysis.

This book is a valiant effort to address the practice of qualitative research. It will likely be most useful to researchers conducting various kinds of program evaluations, to those interested in identifying and resolving problems impeding the work of organizations and other groups, and to researchers who see research results as data based and verifiable, treat data as indexes of actual events and experiences, and want research results that can be transformed immediately for use. This is a book for researchers who want qualitative inquiry to be more transparent, more traceable, more codified, and more like quantitative research. The strengths of the book include the illustration of systematic ways of conceiving projects, of projecting sampling frames, and of generating, arranging, and analyzing data. Especially of value is the assistance the book provides in identifying all of the constituencies having a stake in a target event and the relative power relationships among them, and in generating research hypotheses.

5. Smith, A. *Review in Organizational Research Methods 2005: 8; 481.*

Excerpt: *Interactive Qualitative Analysis* by Northcutt and McCoy presents a new qualitative research approach. Before I received this book to review, I was not aware of interactive qualitative analysis (IQA). In fact, to prepare for this review, I conducted a search on the Business Source Premier (EBSCO) database for articles using this research approach, but I did not find this methodological approach cited. However, this may be due to the relative newness of this approach (developed by one of the authors in 1993) and its primary use in the field of education. With at least 26 types of qualitative research (Blank, 2004; Tesch, 1990), there should be room for a qualitative approach that offers an important role for participants during data collection *and* data analysis processes.

The IQA research methodology is not for every qualitative project, nor does it claim to be. This methodology is built on ideas from systems theory, but this approach also includes aspects of dialectical logic, grounded theory, concept mapping, action research, total quality management, the social construction of reality, and postmodern views of society. The purpose of IQA is to develop a picture of a phenomenon through the lens of a group. The authors describe IQA as a process in which the “researcher’s engagement is highest at the beginning (design), decreases during data collection, is at a relative minimum during analysis (which is largely protocol or rule driven), and increases during the interpretative stage” (p. 292). Key features that I found novel were the use of focus groups for data collection and direct participant involvement in creating the resulting process model.

At the end of the book (pp. 421-423, chap. 11), I was intrigued by the application of IQA techniques to the analysis of a written text. I could envision utilizing IQA techniques with a group of graduate students who would read the text from an interview. Then, using the IQA approaches discussed in chapters 5 and 6, these students could identify concepts in the text and then construct relationships between these concepts.

As Northcutt and McCoy stated, “IQA is more than just focus groups and interviews; the skills and tools associated with axial and theoretical coding provide one with away of thinking” (p. 421). Overall, *Interactive Qualitative Analysis* introduces a novel approach to qualitative research.

5. Menken-Bekius, C J. *Review in International Journal of Practical Theology December 2005, 9:2, pp 324-342*

Is Interactive Qualitative Analysis (IQA) an adequate method for empirical practical theological research? That question is addressed in this book review. In order to answer that question, I will first give a short summary of the contents of the book and then discuss some basic thoughts of the underlying research philosophy and the presented method itself.

Interactive Quality Research is a new integrative approach to qualitative research. The purpose of the book by Northcutt and McCoy is to provide researchers, teachers and students with a clear and systematic method to describe, analyze and evaluate the meaning of a phenomenon in terms of elements (so called affinities) and their relations.

It is a contextualized approach, rooted in systems theory. The focus of the book is the construction, interpretation and comparison of so called mindmaps (representations of the way individuals or groups understand a phenomenon). Chapters 1-4 give a theoretical framework. Chapters 5-6 describe how group processes are used to create a picture of the phenomenological reality for a group. The method of building Mindmaps by formulating affinities is introduced step by step. For that purpose a theory of coding is introduced (chapter 5) and situated within a wider epistemological context of the logical operations of deduction and induction. The next chapter describes how to go about creating a set of relationships, as perceived by the group, to exist between affinities. Chapters 7 and 8 describe protocols for conducting and analyzing an IQA interview. In 9 and 10 the issues of description and interpretation are addressed.

There is no such thing as pure description; it is always interpretation as well, and all interpretations involve implicit or explicit comparisons. It is because of these implicit or explicit comparisons that the IQA theory encourages the researcher to make formal comparisons between and among individuals and groups, and provides procedures for doing so. Chapter 11 provides some actual examples of IQA studies to demonstrate the interpretive potential of the methodology. Here we see a variety of disciplines and topics. The book is accompanied by a CD with interactive exercises and IQA tools.

The authors are aiming high. It is their goal that, within a decade, IQA systems theory will be as well known and as frequently cited as grounded theory is at present. Where do we find IQA in the battlefield of the 'Paradigm Wars'? (For a description of that battlefield in Practical Theology see: J. A. van der Ven & H-G. Ziebertz, *Paradigmenentwicklung in der Praktischen Theologie*, Kampen: Kok 1993.)

Northcutt & McCoy state in their first chapter: 'The understanding of what constitutes good research, or, for that matter, what is research at all, is fundamentally an ideological system composed of the seven elements described in this chapter. These elements are more than just a list; they interact with each other in meaningful ways.' (p. 18) The mentioned elements are: 1) Knowledge and power are largely dependant. 2) The observer and the observed are interdependent. 3) The object of research in IQA is reality in consciousness (*italic CJMB*), rather than reality itself. 'Reality' is a far too elusive construct for any research study. 4) IQA insists that both deduction and induction are necessary for the investigation of meaning. 5) Decontextualized descriptions are useful and possible as long as they are backed up or grounded by highly contextualized ones, and as long as the process by which the text is decontextualized is public, accessible and accountable. There is a difference between research and storytelling. 6) IQA is favorable to theory. The mindmap of a group or individual is, in fact, a theory: a set of

relationships from which hypotheses can be deduced. But it is a theory only with respect to a particular phenomenon. As the word theory could create a roadblock in the discussion with colleagues who are more inclined to positivism, the authors prefer the term representation. 7) The traditional concepts of validity and reliability are still useful ones. The operational definition of internal validity in IQA is the extent to which a System Influence Diagram (mindmap) is consistent with the individual hypotheses comprising it. The external validity is the extent to which mindmaps are constructed by independent samples of the same consistency and on the same phenomenon. The reliability of the method is proved by presenting the same description of the same phenomenon to succeeding cohorts of doctoral candidates for several years.

One of the great merits of this method is, in my view, that IQA offers a way to avoid the unfruitful polarization of the public discourse on 'valid research'. The method is only fanatic in fighting the Zealots in both camps. After the 'anything goes' thesis of the postmodernists ('all claims to truth are false'), in opposition to the positivistic thesis ('truth can be found by a careful and objective analysis of data – truth is evidence based'), the emphasis here lies on systematically executed reflection in a dialectical mode. 'Truth, by which is simply meant a useful way to think about reality, is a dialectic created by the dynamic interaction of the two components of the paradox.' (p. 23) The meant paradox suggests that A) there are no universals, principles or metanarratives and B) seemingly disparate phenomena are often discovered to be fundamentally similar when analyzed from a systems point of view, a pattern that suggests there might indeed be underlying principles or metanarratives. In my words, this statement tells us that there is indeed a difference between research and storytelling, but that we do need the 'stories' (narrated experiences), and the views and clues of participants who are 'making up' a social situation in order to describe, analyze and evaluate a phenomenon in that context, and that we should start the enterprise here. But scientific reflection needs distance and external judgment as well. So the question arises (my question anyway), of how and where in the research process does IQA connect the findings with more generalized or transcending theories and insights. Or am I thinking in a too positivistic (or perhaps a too theological) way already by looking for those connections?

Let us have a closer look at the IQA Research Design to find an answer to that question. Many of us, who are familiar with the specific difficulties of beginning empirical research (or with coaching students to find their way in this landscape), will start by formulating a problem statement, followed by a set of research questions. They argue: If one wants to solve a problem, one must generally know what the problem is. This is a rather positivistic way to start, though it is not an easy job to formulate a solid problem statement and questions, which will lead us to relevant and interesting answers. It will take a lot of study in the first place to know how to develop good questions. Others, who are more ethnographically oriented, choose not to use that sort of language at all. They describe their research in terms of a voyage. Whereas some travelers are making detailed plans, with all the stops and routes set in advance, they just need a direction to take off. They will see what comes along their route.

A qualitative researcher is like a loosely scheduled traveler. He starts with a hunch and a travel kit. With this image, borrowed from Bogdan and Biklen, Northcutt and McCoy sketch an epistemological dialectic. (p. 53-54) IQA offers a synthesis, not a compromise, to both ways of travelling. Their 'how to do this' (design a qualitative research) is demonstrated by 'touring the system' through comments on several verbatim dialogues between a PhD student and her coach, resulting in several tables and schemes. Another research scheme is followed throughout the book.

An IQA research could start like this: (p. 56-71)

A. 'So, tell me about your dissertation ideas. You're in human resources, right?

D. Yes, but more in organizational development. We do a lot of specialized training

(...)

A. And you are interested in doing your dissertation research in that area?

D. Yes... maybe... I'm not really sure. (...) I've gotten really interested in how people react to being laid off. (...) I noticed that no matter what the situation, some people seem to have more of a sense of efficacy than others. The way people deal with layoffs is simply one example.

A. Give me more examples of efficacy...'

The following discussion is about D's understanding of the term 'efficacy'. At the end of that first dialogue, D summarizes: 'I want to know why some adults weather change better and believe in their ability to learn new skills or requirements when others don't.' Her homework is to develop a list of groups that she wants to talk to about this problem. She must order her list in two different ways: first by distance to the problem and second by how much power they have over the phenomenon.

She also has to think about issue statements. What single issue does she want the members of each group to talk about? In the second dialogue, A comes back to her 'problem statement' by exploring the meaning of the word 'and' in it. D says it is 'plus' (A *and* B), but then discovers that she is reading it as a 'because'. A tells her, that in that case, her study is very easy and has already been done, all by herself. Her statement contains both the question and the answer, what is known in mathematics as a tautology. The dialogue goes on.

The concrete written dialogues show a skillful Socratic way of interviewing. The teacher is teaching his student how to teach him/herself in asking questions and finding answers. The teacher abstains from giving his own ideas. The interview method is exemplary for what the researcher will do with the participants of the groups, once they are selected. 'The researcher, in effect, participates in a systematic internal dialogue, moving around the hermeneutical circle until he or she is satisfied with the answers to the questions that have been raised.' (p. 61)

After the groups (*constituencies*) have been formed, the process of looking for the components of meaning (*affinities*) in each group will start, as they are coded by the members themselves, in order to build their *mindmaps* in cooperation with them (step 1). The relationships between the affinities in terms of influences or cause and effect are formulated (step 2, both intrasystematically). This is followed by comparisons between the constituencies who differ either in experiential distance or in power over the phenomena. All possible comparisons are numbered and the most important selected. It is primarily through the comparison of different constituencies' mindmaps that the researcher gains insight into the meaning of a phenomenon. Comparisons bring different perspectives to the light and with them the questions that need to be answered. Then the researcher can reflect at a deeper level on the first outcomes. It will be noticed that A is *not* advising his student to go to the library or to her computer and read everything that has been written about job lay-offs and a dozen other topics which came to her mind in this stage. At some point the researcher has to be aware of the current state of research, both theoretical and applied, but not prematurely. The researcher must stand on his or her own feet in the field first.

First question is: Is IQA an adequate method for empirical practical theological research? A second follows: How does one connect IQA transcending (or underlying) theories and insights to

the concrete findings of the comparisons? To answer the first question: I do think indeed that IQA, developed in the field of social sciences, offers a very clear and practical method for qualitative research in the field of practical theology.

In practical theological research we want to know what is going on in people's minds and hearts in certain situations, not only how they *act*. To that end we need qualitative interviews. When I want to research, for example, the beliefs, hopes and despairs of terminal ill patients in a hospital, I could use IQA to make *mindmaps* of those patients who derive comfort and sustenance from their spiritual sources and those who do not seem to do so (in close distance to the phenomenon, one group with more power than the other – subject to empirical verification). I could also interview people who care for them (family, nurses, doctors, chaplains) about their views and experiences with the spiritual dimension of their care (different positions along the distance line and the power line). When the patients are still able (and willing!) to talk about their situation and feelings, the interviews could (should) have a pastoral quality as such. Comparisons between the affinities of different groups could make people conscious of what is going on, and may be what should be changed. Eventually it could lead to better spiritual or pastoral care. I can see that. To research a practice in a careful way is intervention anyway, and it could result in a change of strategy when it is a goal. I did not find a good enough answer to my second question however.

Certainly, IQA tools and skills can be used to analyze written discourse as well; it is a way of thinking. But for theologians the thesis that '*truth is a useful way to think about reality*' is a bit thin. Even if the authors are right in their claim that we can use IQA as well to explain, simplify, contrast, and synthesize the complex discourses of great philosophers and theologians throughout history, I would like to be shown how to connect *in practice* (by comparison) systematic theological concepts to, for example, the mindmaps of the people who care for dying patients; or to a small middle class church community, where a nearly burnout pastor is trying to keep the flame of tradition burning.

Lots of books about practical theology are not practical at all. They may offer us great thoughts and reflections on all sorts of theological theories and themes, but the 'how to do issues', the *practice* of practical theological research, are very often not addressed, or only in very abstract ways. I expect this book will be of great help to all researchers and students who want to do empirical practical theological research in a hermeneutical mode. It will keep the researcher with both feet on the ground, and that is where the people are, with their experiences, emotions, thoughts and beliefs.