43 Teaching Theme Identification

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Brief Description of Method

Identifying themes is a fundamental activity in analyzing qualitative data. Yet, across the social sciences, few students are taught how to use specific techniques to (1) *systematically* identify different types of themes in a text; or (2) *articulate* how they identified themes when they report their methods of analysis. We find that it is best to teach theme identification through concrete examples and hands-on activities so that students develop their own skills in identifying themes.

References for Further Reading

Ryan, G. W., and H. R. Bernard. 2003. Techniques to Identify Themes. *Field Methods* 15: 85–109.
Spradley, J. 1979. Discovering Cultural Themes. In *The Ethnographic Interview,* 185–203. Belmont: Wadsworth. Reissued by Waveland Press 2016.

Estimated Teacher Prep Time

60–90 minutes
- Read or review Ryan and Bernard (2003).
- Prepare PowerPoint slides (provided) and homework materials for students (provided).
- Using some of the techniques in two readings, identify themes in the two narratives on the PowerPoint slides. This will ensure that you have specific examples to guide students during the lecture and activity.

Estimated Duration of Lesson

- 80-minute in-class interactive lecture
- 60-minute student-independent activity (homework)
- 20-minute reflective discussion (in a follow-up class session)

Materials Needed

- PowerPoint slides (provided) outlining "12 Techniques to Identify Themes"
- Teaching data set (provided) on "illness narratives"

Student Pre-Class Preparation

None. Students need to have read the Ryan and Bernard article before class.

Learning Outcomes

Completing this activity, students will be able to: (1) define what a theme is and describe why identifying themes is important for analyzing qualitative data; (2) identify and articulate 12 techniques for systematically identifying themes in qualitative data; (3) explain the strengths and weaknesses of each theme identification technique; and (4) select theme identification techniques that are more useful or less useful for different types of qualitative data.

Lesson Instructions

This lesson has three parts: (1) an in-class interactive lecture; (2) a homework activity; and (3) a reflective class discussion. It is appropriate for advanced undergraduate and graduate students.

Interactive In-Class Lecture (~80 minutes)
Overview:

Using the provided PowerPoint slides, proceed with the lecture as follows:

1 *Explain what a theme is and where themes come from:* 5 minutes (PowerPoint slides 1–5). As you explain the definitions and characteristics of themes, give specific examples of themes in your own research.
2 *Tell students what we are doing today in class:* 3 minutes (PowerPoint slides 6–7):

Potential script:

> Today we will be walking through 12 techniques to systematically identify themes in qualitative data. These techniques were outlined by Gery Ryan and H. Russell Bernard in their 2003 *Field Methods* article. *Observational techniques* involve close reading and scrutiny of the text itself, while *processing techniques* involve manipulating text in some way that allows you to more easily identify themes. I'll explain what each technique is, and then we will practice using it together. To practice, we will try to find themes in two narratives, collected by Ryan, in which students at the University of Missouri in the United States describe their most recent experience having a cold or flu. Let's start by reading the narratives.

3 *Read narratives out loud or select students to read each narrative out loud*: 2 minutes (PowerPoint slide 8).
4 *Prompt the class on how to look at the narratives*: 2 minutes (PowerPoint slide 8): Having a cold or flu is such a common experience, the themes in narratives like these may seem too obvious to identify, especially for those who may be insiders to this specific culture. To deal with this, tell students:

> Imagine you are the proverbial researcher from Mars and you are here to study how illness manifests in humans. Your prior research has shown that humans contract two diseases that those in English-speaking areas call 'cold' and 'flu,' and now you are here in the United States on Earth to interview humans and find out what people do when they are sick with them.

Re-framing the narrative this way makes it easier for students to identify themes in the narratives—and it also makes the activity silly and fun.

5   *Walk through the eight observational theme identification techniques:* 40 minutes total, 5 minutes for each technique (repeating PowerPoint slides 9–10 for each technique). For each technique, do the following:

- 1 minute: Explain what the theme ID technique is and how it works.
- 1–2 minutes: Ask students to read through the two narratives on the PowerPoint slide and use the technique that you just explained to identify themes in the narrative.
- 1–2 minutes: Ask students to share the themes they identified with the class. In small classes, we ask students to call out and share the themes they identified out loud. In larger classes, we ask students to raise their hands if they want to share the themes they identified. If you have more time, you can go around the class asking each student to share.
- 1–2 minutes: Use the themes that students identified to explain the strengths and weaknesses of particular techniques. For example, word repetition (finding repeated words) is easy to do and can be done very quickly (strength), but it generally identifies themes that are obvious and can be superficial (weakness). The identifying metaphors technique, on the other hand, is a much more difficult technique that can take a long time (weakness), but it often identifies themes that are complex and not always obvious (strength).
- Repeat for the next technique on the list until you have gone through all eight observational techniques.

6   *Briefly explain the 4 processing techniques:* 10 minutes total, 2–3 minutes for each technique (PowerPoint slides 11–16). For these techniques, it is more time efficient to walk through examples outlined on PowerPoint slides. You can use the examples we provide on the slides or other examples from your own research or that of others.

7   *Depending on the type of data you have, conclude the lecture by explaining when to use different theme identification techniques:* 5 minutes (PowerPoint slides 17–18). Walk students through the data-type decision tree (slide 17) and the chart that outlines the strengths and drawbacks of each theme ID technique (slide 18).

8   *Questions and explanation of homework activity:* 10 minutes (see homework activity directions below).

Homework Activity (~60 minutes)
Overview: Provide students with the digital data file of 25 illness narratives.

Assignment Instructions for Students:

1   Open up the 25 illness narratives, either in your computer's text edit program (Notepad and Wordpad on Microsoft machines or TextEdit on the Mac) or word-processing program (Word.doc files on PCs and Pages files on Macs), or import them into a QDA program (e.g., create a MAXQDA or NVivo or Atlas.ti file).

2   Of the eight observational theme ID techniques we discussed in class, choose the technique you feel most comfortable with. Use that technique to identify themes from the illness narratives. Write down the themes you identify based on that technique. Most of you will prefer to use your computer, but this can also be done with pen and paper.

3   Choose three techniques that are new or unfamiliar to you—these can be from the eight observational techniques or the four processing techniques we discussed in class. Use each of these techniques to identify themes in the illness narratives. Again, write down

the themes you identify based on each technique. You should have four lists of themes total—one list for each theme identification technique you used in steps 2 and 3.

4 Write-up: In a paragraph, discuss similarities and differences in using the four different techniques that you chose. How did using the first (more familiar) technique differ from the three new or unfamiliar techniques? Which of these techniques do you think would be most fruitful for your own work and why?

5 Turn in/bring to class: Your write-up of the four lists of themes plus one paragraph of discussion. Be ready to discuss your results and experiences with your classmates.

Reflection and Class Discussion

Overview: This discussion should happen after the students have completed the homework activity (~20 minutes). The goals are to have students (1) *reflect on* their experiences using the different theme identification techniques; (2) *hear how* other students used and experienced the techniques; and (3) *come to understand* what techniques come more or less naturally to them based on their own experiences, strengths, goals, and preferences as researchers. Depending on the size of your class, this discussion can be among all members of or in small groups, who then come back to report back to the class.

Discussion Questions:

1 Before this lesson, had you used any theme identification techniques (either those covered in the class or others) in the past? How do your past experiences with theme identification compare with the exercise we did in class?

2 Are there any techniques that you particularly enjoyed using in the homework assignment? If so, why? In what contexts do you think these techniques would be very useful for your own research?

3 Were there techniques you disliked using in the homework assignment? If so, why? Would you use these techniques for your own research? Why or why not?

Online Teaching Modifications

This lesson can easily be adapted for online teaching by (1) posting a PDF of the reading to an learning management system; (2) giving the lecture live and having students interact as described, or prerecording and posting a modified lecture where you describe each technique and ask students to pause and do the activity rather than soliciting student responses; (3) posting the homework instructions and having students turn their work in online; and (4) requiring either a written discussion board where students respond to each other in reflecting on the exercise or synchronous, online class discussion. If doing written discussion boards, follow up with an email or discussion board post to students that wraps up the lesson, acknowledges their thoughts, and summarizes key points.