

## **Project Planner Template: How to work backwards from what you want to achieve from your research to how to manage your NVivo project**

### Your research

1. Start by thinking through your own experience of the problem you are studying.
  - a. What are you really interested in finding out about this topic? *[e.g. 'I am interested in understanding how teachers use online technology to develop their own learning.']*
  - b. Why should anyone else be interested in your topic? (The big 'so what?' question we all have to answer in our research!) *[e.g. 'no one else has looked at the topic using these two frameworks that I'm using...']*
  - c. What are you 'expecting' to find in your study? *[e.g. 'teachers need leadership support to use online technology effectively.']*
  - d. What assumptions (maybe even 'hypotheses') have you found in the literature, or do you yourself have around the topic? Do you want to find evidence 'for' and 'against' these? How? *[e.g. 'the academic literature mentions that teachers need 'leadership support' to use technology but no one defines what this means. I want to find out what 'leadership support' might mean to different kinds of teachers.']*
2. Imagine you are trying to explain your topic to someone else. How can you break your study down into simple components or concepts? *[e.g. 'schools, teachers of different subjects/years of experience, pupils, the online platform, the platform's designers, knowledge about information technology, teachers' professional experience']*

3. Can you think of important relationships that may exist between some of those concepts or components in Q2? *[e.g. teachers' use of the online platform >> (influences and is influenced by) >> how the platform is designed]*
  
4. How will you use NVivo to help you answer these all of these questions in Q1, 2 and 3? *[e.g. 'I have data from teachers (interviews and observations) and I have data from the platform designers (interviews and design drawings). I can upload these into NVivo for analysis.']*
  
5. Explain step by step what 'analysis' you are going to do. *[e.g. 'I am going to look at the similarities and differences between teachers' interviews and designers' interviews in how they define 'leadership support'.]*
  
6. What will you need to do to your data/documents to allow you to do this analysis? *[e.g. I have to transcribe all my interviews and save them as Word documents. Then I have to 'code' when teachers or designers talk about 'leadership support' (or when they use similar words). I have to know whether the data I am looking at was provided by a teacher or a designer so I can make comparisons. To do this, I will have to tell NVivo if each data source has come from a teacher or designer.]*

## Your NVivo project

- 1) Consider the planned outcomes for your research project. What is your end goal?
  - A. Reflect on what do you need to do with your data to meet your goal.  
*[e.g. I need to produce a table that shows all the different definitions of 'leadership support' and whether a designer or teacher said it.]*
  - B. What kind of analysis do you plan to use? *[e.g. I will use Discourse Analysis – where I will study the actual words people have used and the context around them.]*
  - C. What features of NVivo will be helpful to meet your outcomes? *[e.g. 'Files – to store my interviews (Word documents) and academic literature (PDFs and images); Cases – to tell NVivo whether a teacher or designer said something in an interview; Codes – to code 'leadership support' in each interview.']*
- 2) 'Queries' can be helpful in exploring your data and identifying links and relationships.
  - A. What types of queries could be helpful for your data? *[e.g. 'Asking when a designer talked about 'leadership support', what words did they use? When a teacher talked about 'leadership support', what words did they use?']*
  - B. Discuss with a partner the types of questions you would ask NVivo about your data, or the relationships between your data.



**As we move on to think about structures for data management,  
keep your end goal in mind.**

3) What individual data sources do you have? [e.g. Interviews, field notes, design drawings.]

How will you organise these into internals and externals?

What folder structure would be most helpful?

Use this table to plan your folder structure for your internals and externals.

**Identify any special formatting requirements, given the way you want to analyse them.**

### Sources

#### Internals

Folder 1- Teacher interview transcripts

Folder 2- Designer interview transcripts

Folder 3 – Online platform photographs

Subfolder Webpage 1 photographs

Subfolder Webpage 2 photographs

Folder 4 – Field notes

Subfolder School 1 notes

Subfolder School 2 notes

### Sources



Files

### Sources



Externals

- 4) Discuss your plans with a partner. Can they suggest any changes or alternations to make you structure more streamlined for future data management? *[e.g. You might need to tell NVivo which school the teacher has come from, how will you do that?]*

**Once you're happy with your planned structure you can think about transferring this to NVivo**

- 5) Nodes
  - A. Do you plan to use Cases? If so, how will you organise your cases? *[e.g. teachers, schools, designers]*
  - B. Do you plan to use (thematic) Codes? If so, what sort of information will you design these to represent? *[e.g. 'leadership support', 'learning how to use technology', 'platform design problems']*
  - C. Do you plan to use Classifications? If so, what attribute values are you planning to assign to your cases? *[e.g. I want to tell NVivo the age group of each teacher and designer in my study so I can compare what people aged 20-30 and 30-40 said about 'leadership support'. So, I will need to store classifications about the people in my study – a list of their names, age groups, their job roles]*
  - D. On NVivo have a go at assigning some Cases, and experiment with Case classifications.

6) Sets

A. How could you use sets for your project? *[e.g. make a set of data sources that talk about 'leadership' in any form, to make a comparison between them.]*

B. Discuss with a partner what data could be formed into a set to help you meet your goal?

7) Annotations and memos

A. What are you planning to use memos for? *[e.g. Putting down thoughts - 'teachers talked more about leadership than designers. Why is this?'; 'Field notes when you visited each school'; 'Your coding framework']*

B. Think about what types of memo you want to use and plan your folder structure in NVivo

C. Think about the relationship between memos, memo links and annotations:

a. Are you planning to use annotations in addition to memos?

b. When will you use memo link and when will you use annotations?

D. In your project, what rules will you have for when to use:


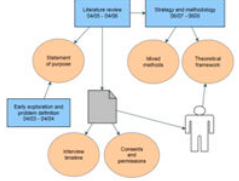

a. memos

b. linked memos

c. annotations

## 8) Mapping

Mapping can be used to visualise data prior to the creation of nodes, or to visualise complex relationships and systems within your data.

Use a	When you want to	Example layout
Mind map	Brainstorm your ideas and visualize your thoughts. Refer to <a href="#">About mind maps</a> for more information.	
Concept map	Define concepts and think through their connections. Refer to <a href="#">About concept maps</a> for more information.	
Project map	Display the items and links in your project. Refer to <a href="#">About project maps</a> for more information.	

[Source: [http://help-nv11.qsrinternational.com/desktop/concepts/About\\_maps.htm](http://help-nv11.qsrinternational.com/desktop/concepts/About_maps.htm)]

- What theories or concepts in your data would benefit from use of the NVivo mapping tool?
- Which maps would be most helpful for you to use?
- Take a look at the maps function on NVivo and try mapping out a useful idea or concept for your project.

## 9) Data visualisation

NVivo offers a number of options for visualisation. For example: word trees; word clouds; graphs; sunburst.

- What features of NVivo visualisations may be most helpful for you?
- Have a go at visualising some of your own data.