INTRODUCTION AND PURPOSE

CAQDAS provides invaluable assistance with textual interpretation, thus facilitating complex analytic processes. CAQDAS projects (i.e., reports and underlying data sources) that result from using such software are rich research products, the value of which is increased when they are shared among scholars. Sharing these projects involves three types of stakeholders – scholars (project creators and re-users), software companies, and digital repositories – and a series of tasks: creating, managing, curating, preserving, and publishing CAQDAS projects. This workshop explores what those stakeholders need to do in order for CAQDAS projects to be shared, what challenges they face in achieving that end, and how their activities can be coordinated to facilitate their productive interaction.

Not all of the obstacles to curating and preserving CAQDAS projects are unique to CAQDAS, however. As such, research communities that use software that poses similar challenges may have developed tools and procedures that might be helpful. For example, CAQDAS involves a variety of software platforms, many of them proprietary, capable of a range of functions. This suggests a set of functional requirements for effective archiving of CAQDAS projects in digital repositories (e.g., details of the software package used, code) and raises issues of cross-platform interoperability for the material deposited. Comparing the archiving of CAQDAS projects with the archiving of data projects developed using statistical packages may be instructive.

| Does data generation and analysis (and hence curation and preservation tasks) involve software? |
|-----------------------------------------------|---|
| **The research is** | **Quantitative** | **Empty set** | **Yes** |
|                                   | (a) R, SPSS, Stata | (c) CAQDAS, QCA/fs |
| **Qualitative** | (b) Traditional qualitative case studies |

Similarly, the raw material (i.e., underlying data sources) that CAQDAS engages may be under ethical or legal constraint. This is not a feature of CAQDAS, but of the data sources. Accordingly, it may be helpful to compare the ingest, curation, preservation and publication of CAQDAS projects with analogous processes for data projects developed using other solutions for associating qualitative data with published research.

From the user perspective, researchers from multiple qualitative research traditions with varying epistemological commitments and methodological perspectives employ CAQDAS. As a digital repository, QDR seeks to assist a wide range of users and hence to implement guidelines and solutions that apply broadly. We hope, through this workshop, to identify best practices for producing shareable CAQDAS projects. These best practices should reflect technical features of the relevant software (e.g., file formats, functionality); typical user practices (e.g., file and variable
naming, documentation); and the interaction between technology and user practices (e.g., users taking advantage of existing functionality; modifying software design to encourage and support best practices).

- **Goal 1**: Discuss (and, if uncontroversial, agree) a statement on the aims of CAQDAS project curation, preservation, and publication.

- **Goal 2**: Discuss the state of the art – previously tested approaches, existing policies, and emerging best practices – for sharing CAQDAS projects and for their ingest, curation, preservation, and publication in digital repositories.

- **Goal 3**: Identify in what ways preparing CAQDAS projects for sharing (for users) and ingesting and publishing them (for repositories) differ from doing the same with data projects produced using software packages for analyzing quantitative data (cell [a] in the table above) or through the non-automated analysis of qualitative data (cell [b] in table above). To the extent there is overlap, how applicable are the solutions developed in those other domains? Can we identify the “issues not yet solved” list, i.e., (1) problems unique to CAQDAS; (2) shared problems for which no solutions have been offered; and (3) shared problems for which solutions offered elsewhere do not fit CAQDAS?

- **Goal 4**: In light of the discussion thus far, develop guidance for how domain repositories should modify their practices and procedures to accommodate the distinctive opportunities and difficulties posed by CAQDAS projects and develop guidance for users to prepare their CAQDAS projects to facilitate sharing.

- **Goal 5**: Discuss the features or characteristics of CAQDAS software (if any) which, if revised or changed, would help CAQDAS users to manage and share their CAQDAS projects, and help data repositories to ingest, curate, preserve, and publish CAQDAS projects. Identify ways in which such changes might produce additional benefits, e.g., augmenting interoperability among different software platforms.

**AGENDA**

8:30-9:00  Check in / breakfast

9:00-9:45  Introduction and Overview

Identification of the range of tasks repositories carry out in relation to CAQDAS projects. Discussion of the draft consensus statement on the aims of CAQDAS project curation, preservation, and publication.

9:45-11:00  Topic I: CAQDAS and Data Repositories – Practices and Challenges

What are current repository best practices for ingesting, curating, preserving, and publishing CAQDAS projects? What are existing user practices for sharing CAQDAS projects and the data sources associated with them? What features of a CAQDAS project make it valuable for sharing? What challenges remain -- for scholars and repositories?
11:00-11:15  Coffee break

11:15-12:30  Topic II: CAQDAS Users – Facilitating Data Management

Making research data accessible for reuse requires sharing the data and providing complete documentation detailing how the data were generated and analyzed. How does this requirement intersect with CAQDAS use? What are best user practices to meet data management requirements? What user-facing features of CAQDAS could be improved to bake key data management tasks such as generating documentation into the software?

12:30-1:30  Lunch

1:30-2:45  Topic III: CAQDAS Developers – Interoperability and Exchange

What are the benefits of, and challenges to, achieving interoperability among CAQDAS programs? How does interoperability facilitate sharing CAQDAS projects via domain repositories? (QuDEx, KWALON)

2:45-3:00  Coffee break

3:00-4:15  Topic IV: CAQDAS and Domain Repositories Redux – Enhanced Publication

What practices can digital repositories adopt and what tools can they develop in order to move beyond simply offering CAQDAS files for download toward, for instance, enhanced exploration of data on-line and greater searchability? What functionality might be introduced initially?

4:15–4:45  Closing Summary and Suggestions for Future Activities