

Learning Exchange Protocol¹

Q Methodology

Inquiry using Q Sort Process

Note: All protocols have multiple origins. The strength of a protocol is in the ability of facilitators or planners to adjust/revise for use in your context. <http://www.nsrharmony.org/free-resources/protocols/a-z> is a good source of multiple protocols for school, district, community and organizational use. Special thanks to Matt Militello and Chris Janson for this protocol. Please contact authors if you want information.

Outcome: Analyze attitudes and values about a topic by gathering a collective range of perspectives on the topic.

Description: Q methodology is a culturally relevant way to engage communities in data collection and dialogue. Q methodology was initially developed in the 1950s as a way of understanding attitudes and values individuals hold toward a particular issue or topic (Brown, 1986). Q-methodology uses distinct psychometric principles and operational procedures in order to provide researchers with the means to systematically and rigorously identify, describe, and examine human subjectivity.

Q is powerful tool in order to understand values, attitudes, and perspectives of people. The method allows evaluators to maintain a very close proximity to participant subjectivity – a proximity that is believed to honor and maintain the integrity of participants’ cultural identities. In fact, Q methodology has been called a “methodology for the marginalized” (see Brown, 2006). We have found the methodology especially useful in historically marginalized communities where there is a reluctance to engage in traditional evaluative processes.

Theoretical Underpinnings: Q methodology is a tool that uniquely bridges qualitative and quantitative data in a single analytic lens because participants’ expressed subjectivity (their individual ideas) are collected through the individual responses they have to statements related to their attitudes about a topic. The way they sort the information is then translated into aggregate data for use in dialogue about the topic.

Note: Some of the specifics of the evaluation process below are a part of the statistical analysis the facilitators use to report the information to the group. These statistical processes and language do not need to be understood by all in order for the sort and process to work effectively.

General Process: In specific terms, participants sort a set of statements (or other items) about a given topic in ways that reflect the complexities and nuances of their perspectives. These individual “sorts” are then subjected to statistical analyses (factor

¹ The InQuiry/Q Sort Methodology process did not originate with the CLE, but it has been incorporated in multiple CLEs and been refined to be include participation of every level: statement design, analysis, and use of findings.

analysis where participants, not survey items, are the variables). Factor analysis then yields groups of participants who cluster (factor in affinity groups) around the topic.

While this leads to a way to quantitatively measure and examine peoples shared perspectives, the real force behind the methodology lies in the participatory nature of this process. Q methodology is highly participatory as a research approach because participants define, decide and make meaning throughout the process. Over the past few years as part of our work in community, we have extended the participatory nature of Q in our evaluation processes beyond simply the construction of the research instrument to the data analysis and interpretation by inviting participants to be agents in synthesizing group understandings.

Specifics of InQuery

Not one evaluation tool or metric offers complete understanding or validation of impact or measures the extent or depth of change as a result of a given project. However, InQuery has a number of benefits that far outweigh the shortcomings and include:

- provides insight into respondents' *viewpoints* related to specific issues or ideas
- enables sensitive issues to be explored in a way that is at once more directed by group perspectives (as opposed to the perspectives of the evaluator or implementer)
- is participatory and engaging (as distinct from a self or enumerator administered survey) and
- yields statistically valid results related to the factors or clusters of items , which allow for comparison of how treatment and comparison groups might (or might not) differ in the way they perceive particular issues.

At Community Learning Exchanges, Q methodology has been modified to be even more inclusive and participatory. The CLE evaluation team has dubbed this InQuery (Militello & Janson, under review). The InQuery process included participant involvement and contributions at each part of the research and evaluation processes: not only with the creation of the research instrument and data collection, but also regarding the actual analysis of the data, and the extension of the results to real work in real communities. As such, this work is significant not only because it elevates the voices of a diverse set of community leaders and members, but that it also frames a process in which a rich diversity of voices can be applied to their own meaning-making and their communities' development. The example provided in this article describes the InQuery process from the inputs (creation of statements), throughputs (sorting exercise), and outputs (participatory data analysis).

The InQuery process is congruent to our commitment to assessment and evaluation that is participatory and that this engagement is collective among participants. We have found that the participants who have responded with the most enthusiasm to being

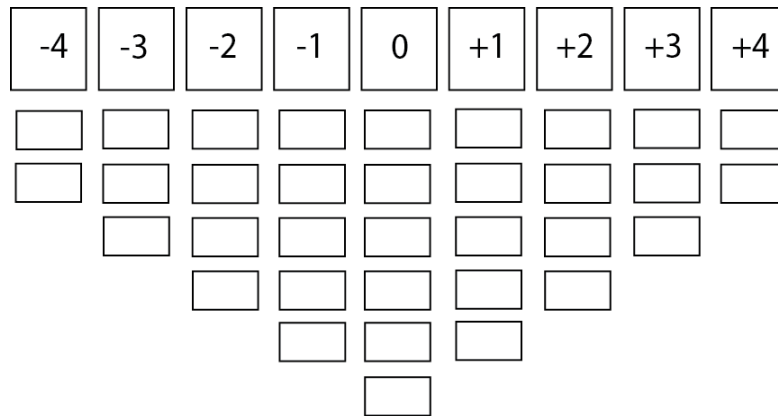
involved with this InQury process have very often been those representing indigenous and native communities. Many of these participants have communicated that their belief that Q methodology. The InQury process deeply honors their subjectivity – both their idiosyncratic subjectivity as individuals, but also the collective subjectivity of their communities through the cultural meanings, values, understandings, and nuances that make their cultural views rich and strong.

Thus, we have found that Q is also valuable in vulnerable settings that require trust from participants in the evaluation process. Other assessment and evaluation approaches are designed with the purpose of understanding participant subjectivity (case studies, survey methods, etc.), and provide useful tools. However, our application of Q methodology in the InQury process is a unique and powerful way to reduce the distinctions between evaluator and evaluated in order to collectively produce, analyze, and extend meaning from data that is at a generous proximity to participant voice.

The InQury process has evolved to include participant involvement and contributions at each phase of the research and evaluation process: not only the creation of the research instrument and data collection, but the actual analysis of the data, and the extension of the results to real work in real communities. As such, this work is significant not only because it has elevated and magnified the voices of a diverse set of community members and leaders, but that it frames a process in which their voices can be applied to the

Step-by-Step Process

- 1. *Topic to Examine Subjectivity.*** Name the topic that you want to understand communication around. Subjectivity is communication that is self-referent; particular to a given person's point of view; existing only within the mind of the one who experiences the phenomena.
- 2. *Concourse.*** A collection of statements that represent the discussion about a particular topic in participants' own words and language. Note: this can include artwork, objects, behaviors, photographs, traits, cartoons, and other items.
- 3. *Q-Set.*** Also called Q-sample; a representative sample of items taken from the concourse that reflects the nature of the larger set of statements or representations. Usually within a range of 18-50.
- 4. *Q-Sort.*** A forced distribution ranking or scoring of items in the Q-Set by participants; statements are quantified by ranking "them, relative to one another." The forced distribution can take many forms and usually look like the figure below. The sorts can be done either on line (see link in resources) or in person using printed cards. See the sample protocol used for individual face-to-face sorts.



5. *P-sample*. Individuals who perform Q-Sorts; also called Person-sample or P-set; it may be conveniently or theoretically structured.

6. *Statistical Analysis*. PQ method (see link in resources) is the most convenient way to analyze the data (you can use SPSS or SAS as well). The programs allow you to enter the data and then (a) create a correlation matrix (vis-à-vis Person Motion), (b) factor analyze the data (Principle Component Analysis with varimax rotation or judgmental rotation).

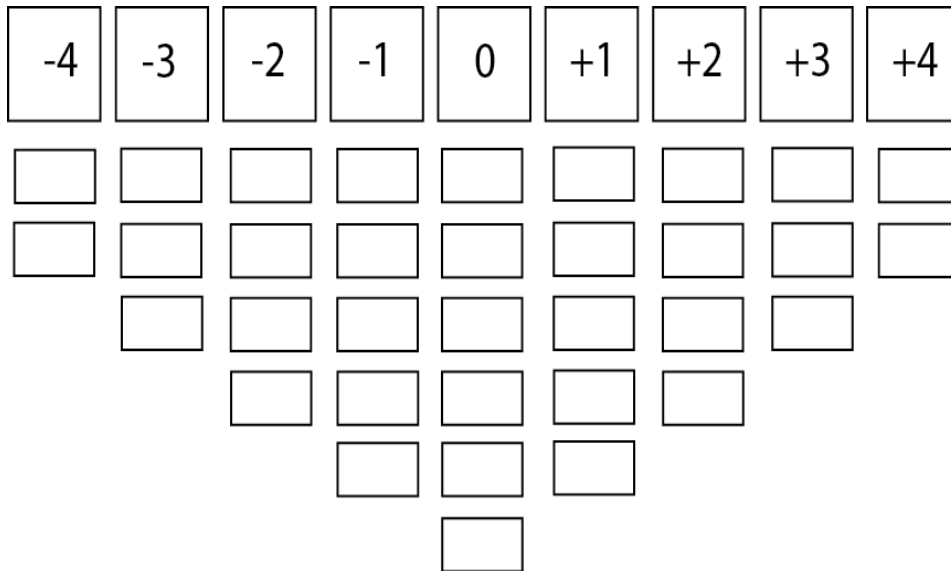
7. *Family Analysis*. The factors derived from No. 6 (by facilitators of process) can be called “families.” We then facilitate a protocol (see family analysis worksheet below). The families are asked to create a logo or theme that can be illustrated or represented on a real t-shirt (see photo) or poster of a book (for a title).

Sample Protocol

Q Sort Instructions:

1. Lay out the number cards from left to right with the negative (-) numbers on your left (see picture below):

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2. Read through all **XX** cards to become familiar with the statements.
3. As you read through the statements for a second time, organize them into three piles:
 - On the right, place the cards that you feel are **most representative of XXXX**.
 - On the left, place the cards that are least representative.
 - In the middle, place the cards that you feel less certain about.
4. Beginning with the pile on the right, place the **XX** cards that you **agree** with the most under the **+3** marker.
5. Now, turning to your left side, place the **XX** cards that you **disagree** with the most under the **-3** marker.
6. Continue this process until all the cards are placed. You are free to change your mind during the sorting process and switch items around.
7. When completed, you should have the following number of cards under each row:
 - You should have **3** cards under markers **+3** (most **agree**) and **-3** (least **agree**).
 - You should have **3** cards under markers **+2** (**agree**) and **-2** (**disagree**).
 - You should have **4** cards under markers **+1** (slightly **agree**) and **-1** (slightly **disagree**).
 - You should have **5** cards under marker **0** (**neutral**).

Post Q Sort Questions:

1) Please list one card under **+3** and your reasons for placing it there.

Card #: _____

2) Please list one card under **-3** and your reasons for placing it there.

Card #: _____

3) Were there specific statements that you had difficulty placing? *Choose one and please list the number of the statement and describe your dilemma.*

Card #: _____

4) What has had the greatest impact on how you sorted your cards the way you did?

5) Is there a statement that you would have like to see in the sort? If so, what would the card have said and where would you have placed it?

Family Analysis Worksheet

Perspective A Group Members		
Task 1: What are some things group members have in common that might have led to sharing a common perspective regarding XXX priorities?		

Task 2: Interpreting your shared perspective of the most important XXX priorities.

It is the position of these statements and their relationship with one another that is the basis for interpretation.

What are priorities are most important to this perspective?

+4	+3	+3
+4	+3	+2

Task 3: Name your perspective

Based on the most important priorities above, what theme emerges?

- If you were to create a marketing slogan from this perspective, what would it be?
- If this perspective were a novel, what would the title be?

Task 4: What are the implications of the priorities for XXX this perspective shares?

- What are the key strengths and advantages of this perspective?
- What are some limitations or vulnerabilities inherent in this perspective?
- How would this perspective of XXX priorities potentially impact students, faculty & staff, community members?

Resources

Books/Articles:

McKeown, B., & Thomas, D. (2013). *Q Methodology* (2nd ed.). London: Sage Publications.

Watts, S., & Stenner, P. (2012). *Doing Q methodological research: Theory, method and interpretation*. Thousand Oaks, CA: Sage.

Brown, S. (2006). A match made in heaven: A marginalized methodology for studying the marginalized. *Quality & Quantity*, 40, 361–382.

Militello, M. & Janson, C. (Under Review). InQuery: Finally an evaluation methodology of the people, for the people. *American Evaluation Journal*.

PQ method Analysis Software (Free):

<http://schmolck.userweb.mwn.de/qmethod/>

All About Q Webpage:

www.qmethod.org

On-line Sorting Tool:

<http://www.hackert.biz/flashq/home/>

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