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Facilitating the Creation of Optimal Transfer Pathways:

Using NVivo for Qualitative Analysis of Learning
Outcomes in Curriculum Documents

October 2016



This research was supported by the Ontario Council on Articulation and Transfer

Determining credit transfer between credential levels is complex...



Ontario Qualifications Framework

Credential Descriptions: Top 60 most frequently used words



Diploma 2-year



Baccalaureate/Bachelors Degree: Honours

Ontario Qualifications Framework

Credential Descriptions: Top 60 most frequently used words



Diploma 2-year



Baccalaureate/Bachelors Degree: Honours

Example Shared words

Ontario Qualifications Framework

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Example Shared words

Ontario Qualifications Framework

Credential Descriptions: Top 60 most frequently used words



Diploma 2-year



Baccalaureate/Bachelors
Degree: Honours

Words Not Shared

Ontario Qualifications Framework

Credential Descriptions: Top 60 most frequently used words



Diploma 2-year



Baccalaureate/Bachelors Degree: Honours

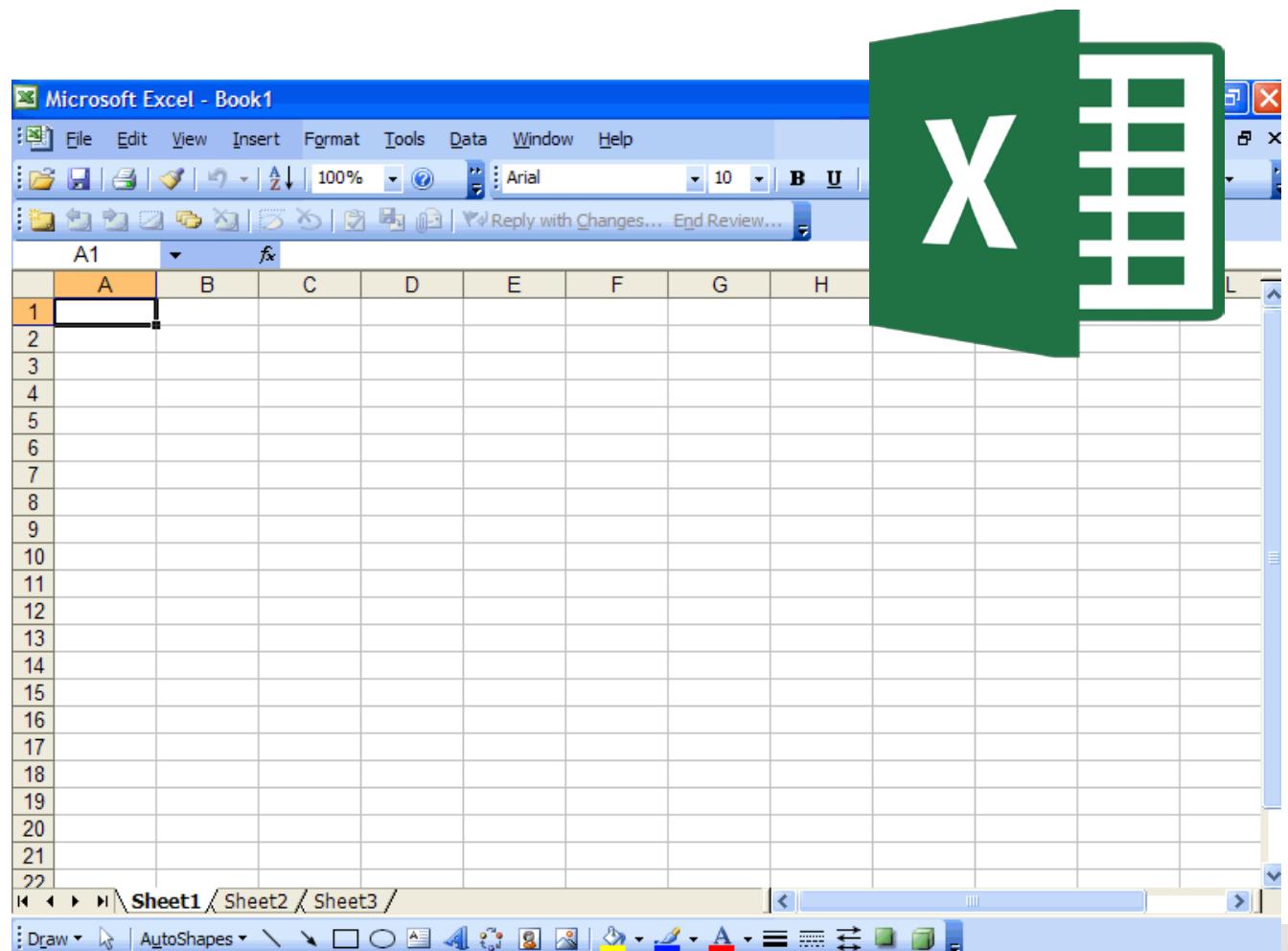
Words Not Shared

Workshop Learning Outcomes

Upon completion of this workshop participants will demonstrate the ability to:

- Apply a manual protocol for determining credit transfer between diploma and degree courses.
- Discuss an NVivo protocol for determining credit transfer between diploma and degree courses
- Compare and appraise a manual and NVivo protocol for determining credit transfer between diploma and degree course

Our “manual” mapping method



Degree Course	Degree Course Learning Outcomes	Diploma Courses		Diploma Course Learning Outcomes
ACTG1000 Introduction to Accounting	Recognize, analyze and record business transactions using Canadian GAAP	ACCT	Financial Accounting 1000 Principles 1	Apply generally accepted accounting principles when recording business transactions; maintain a general ledger and prepare an unadjusted trial balance
	Prepare financial statements for service and merchandising enterprises	ACCT	Financial Accounting 1000 Principles 1	Prepare the necessary period end adjusting entries, adjusted trial balance, and financial statements for unincorporated operations; and complete the accounting cycle
	Apply accounting principles in asset and liability valuation, and recognize the impact on financial statements	ACCT	Financial Accounting 1000 Principles 1	Identify all components of an income statement for a merchandising operation and prepare journal entries under the periodic and perpetual inventory systems
	Complete a manual and a computerized accounting simulation	ACCT	Financial Accounting 1000 Principles 1	Discuss the basic concepts and design of a manual accounting information system, special journals, and subsidiary ledgers
		ACCT	Financial Accounting 1000 Principles 1	5 Reconcile a bank statement with cash, set up and maintain a petty cash fund
		ACCT	Financial Accounting 1001 Principles 2	Estimate and record appropriate adjusting entries for receivables, inventory, capital assets, payroll and liabilities
		ACCT	Financial Accounting 1001 Principles 2	2 Calculate and record payroll deductions and employer expenses
		ACCT	Financial Accounting 1001 Principles 2	Record transactions related to capital assets, partnership equity and corporate equity
		FNCE	2000 Business Finance	Successfully manage the financial resources of any business using the skills acquired
		FNCE	2000 Business Finance	Analyze the financial stability of a business and recommend the appropriate action to take
		FNCE	2000 Business Finance	Apply the complex tools associated with financial forecasting, the knowledge of which is essential in the business world today
		FNCE	Dealership Financial 2008 Statements	1 Use dealership accounting terminology appropriately
		FNCE	Dealership Financial 2008 Statements	2 Analyze the financial stability of a dealership
		FNCE	Dealership Financial 2008 Statements	3 Evaluate the working capital management of a dealership
		FNCE	Dealership Financial 2008 Statements	Participate in an operational performance review of a dealership's productivity and efficiency

Degree Course Learning Outcomes for ACTG1000 Introduction to Accounting

Recognize, analyze and record business transactions using Canadian GAAP

Prepare financial statements for service and merchandising enterprises

Apply accounting principles in asset and liability valuation, and recognize the impact on financial statements

Complete a manual and a computerized accounting simulation

Financial Accounting Principles 1	1	<u>Apply generally accepted accounting principles when recording business transactions</u> ; maintain a general ledger and prepare an unadjusted trial balance
	2	Prepare the necessary period end adjusting entries, adjusted trial balance, and financial statements for unincorporated operations; and complete the accounting cycle
	3	Identify all components of an income statement for a merchandising operation and prepare journal entries under the periodic and perpetual inventory systems
	4	Discuss the basic concepts and design of a manual accounting information system, special journals, and subsidiary ledgers
	5	Reconcile a bank statement with cash, set up and maintain a petty cash fund
Financial Accounting Principles 2	1	Estimate and record appropriate adjusting entries for receivables, inventory, capital assets, payroll and liabilities
	2	Calculate and record payroll deductions and employer expenses
	3	Record transactions related to capital assets, partnership equity and corporate equity
Business Finance	1	Successfully manage the financial resources of any business using the skills acquired
	2	<u>Analyze the financial stability of a business</u> and recommend the appropriate action to take
	3	Apply the complex tools associated with financial forecasting, the knowledge of which is essential in the business world today
Dealership Financial Statements	1	Use dealership accounting terminology appropriately
	2	<u>Analyze the financial stability of a dealership</u>
	3	Evaluate the working capital management of a dealership
	4	Participate in an operational performance review of a dealership's productivity and efficiency

Degree Course Learning Outcomes: AUTM2007 Automotive Technology

Related Diploma Courses and Learning Outcomes: AUTO1001 & AUTO1009

	INTG	2023 Management	3 Management (CONT)	
Explain the main functions performed by automotive service repair shops and some of the issues of appropriate business practice relating to repairs	AUTO 1001	Introduction to Automotive Technology	1 Explain the main functions provided by automotive service repair shops	No link between explaining and business practices or customer care in AUTO1001, but gap remedy in AUTO1009
Distinguish among the various engine configurations and performance capabilities to the extent that the student could reliably answer basic consumer questions about the products	AUTO 1001	Introduction to Automotive Technology	2 Distinguish among the various engine configurations and performance capabilities	No Gap
Explain various engine components and be able to summarize the systems of an automotive engine	AUTO 1001	Automotive Technology	3 Summarize the systems of an automotive engine	
Compare and contrast the components of the electrical and electronic systems	AUTO 1001	Automotive Technology	4 Compare and contrast the components of the electrical and electronic systems	
	AUTO 1001	Automotive Technology	5 Identify the features of an automotive drive-train	
	AUTO 1001	Automotive Technology	6 Explain the components of the automotive chassis	
	AUTO 1009	Introduction to Fixed Operations	1 Service, Parts, and Body Shop Departments of an automobile dealership	
	AUTO 1009	Introduction to Fixed Operations	2 Explain the Fixed Operations departments objectives, operating priorities, and their relative contribution to overall dealership profitability	
	AUTO 1009	Introduction to Fixed Operations	3 Examine the major issues in parts inventory management and the inventory control best practices which optimize the inventory investment	
	AUTO 1009	Introduction to Fixed Operations	4 Critically assess the processes of service reception, workshop production, and service quality control which optimize the trade-offs between Service Department efficiency, productivity and customer responsiveness	
	AUTO 1009	Introduction to Fixed Operations	5 Evaluate productive labour, inventory, management issues and calculate and appraise Technician efficiency, labour utilization and overall Service Department / Body Shop productivity	
	AUTO 1009	Introduction to Fixed Operations	6 Develop a basic system for forecasting and budgeting financial and operational performance	
	AUTO 1009	Introduction to Fixed Operations	7 Analyze and develop typical service marketing and merchandising strategies and tactics	
	AUTO 1009	Introduction to Fixed Operations	8 Forecast personnel requirements and outline parts and service human resources management practices designed to develop personnel and manage performance	



Organizational Behaviour

1. Identify personal skills and qualities conducive to satisfying workplace relations, and explain their effect on the human resource function of an organization
2. Analyze the various influences on employee performance and implement strategies to address poor performance
3. Identify and apply effective leadership qualities and skills that will lead to improved performance
4. Critically assess human resource issues in the workplace and determine strategies for addressing them



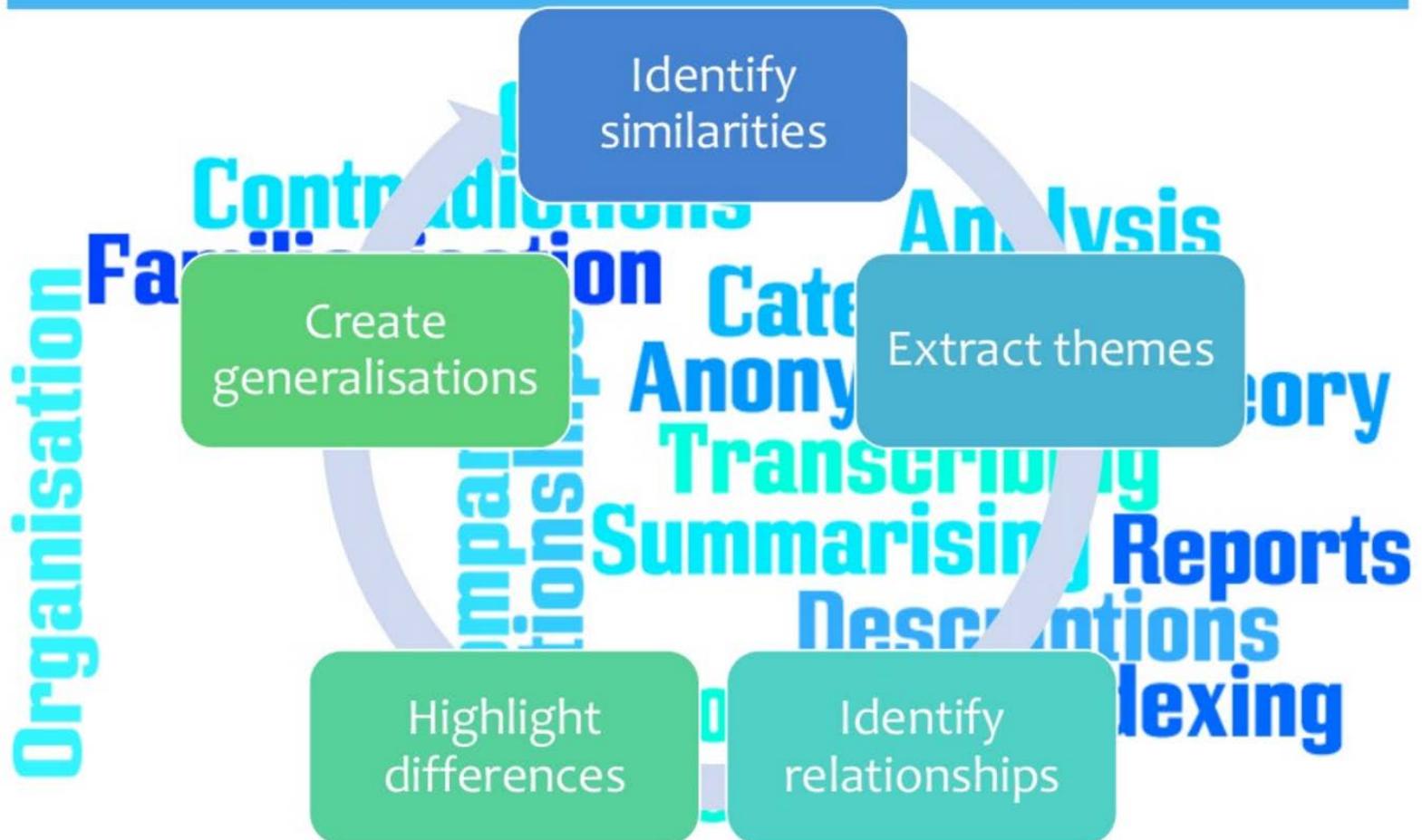
search
documents collect
comparison themes
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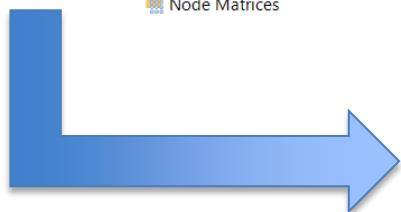
- Apply a manual protocol for determining credit transfer between diploma and degree courses.
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Analysing Qualitative Data



NVivo

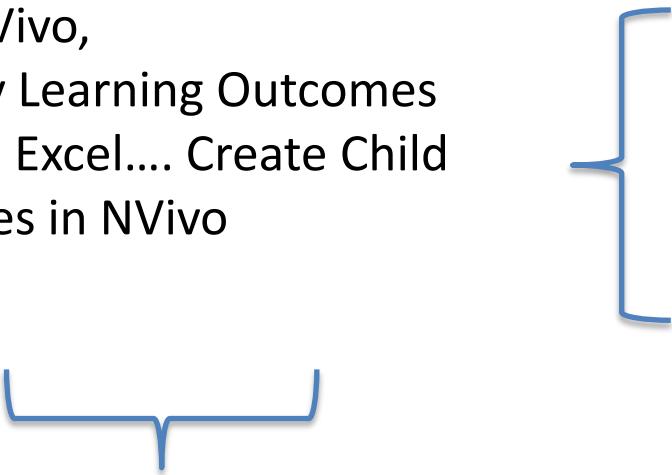
Create Nodes for each Degree Course and Child Nodes for each of its learning outcomes



The screenshot shows the NVivo software interface with the following details:

- Top Menu:** FILE, HOME, CREATE, DATA, ANALYZE, **QUERY** (selected), EXPLORE, LAYOUT, VIEW. The file is titled "BBA(M&L)withLowAffinityBusEntrepreneurship.nvp - NVivo Pro".
- Left Panel:** Nodes (selected), showing a tree structure with "Nodes", "Cases", "Relationships", and "Node Matrices".
- Right Panel:** A list of nodes and their associated learning outcomes. The nodes are:
 - MRKT1000 Introduction to Marketing
 - 1. Analyze and discuss the role of marketing in business, industry, non-profit and government
 - 2. Outline and explain key marketing theories and concepts
 - 3. Evaluate an organization's current marketing activities and recommend viable alternatives
 - ACTG1000 Introduction to Accounting
 - Recognize, analyze and record business transactions using Canadian GAAP
 - Prepare financial statements for service and merchandising enterprises
 - Apply accounting principles in asset and liability valuation, and recognize the impact on financial statements
 - Complete a manual and a computerized accounting simulation
 - MNGM1001 Management Principles
 - 1. Explain the four management functions planning, organizing, leading and controlling.
 - 2. Describe how Canadian business is affected by key business issues.
 - 3. Analyze and apply management theory
 - 4. Utilize the appropriate approach and analytical skills to address issues that arise when one is employed.
 - MNGM1000 Leadership
 - 1. Evaluate a variety of different leadership perspectives
 - 2. Assess key leadership attributes based on current leadership theory
 - 3. Differentiate between leadership and management characteristics and skills
 - 4. Assess contingency based approaches and determine the most appropriate for one's industry of choice
 - 5. Appraise the relevance of various leadership styles given today's global market place
 - 6. Recommend the appropriate leadership strategy to ensure organizational effectiveness
 - 7. Evaluate your leadership qualities and compose a personal development plan
 - INTS1002 Multidisciplinary Research
- Bottom Panel:** A message "Drag selection here to code to a new node".

Copy Course Code/Name
from Excel ...Create Node
in NVivo,
Copy Learning Outcomes
from Excel.... Create Child
Nodes in NVivo



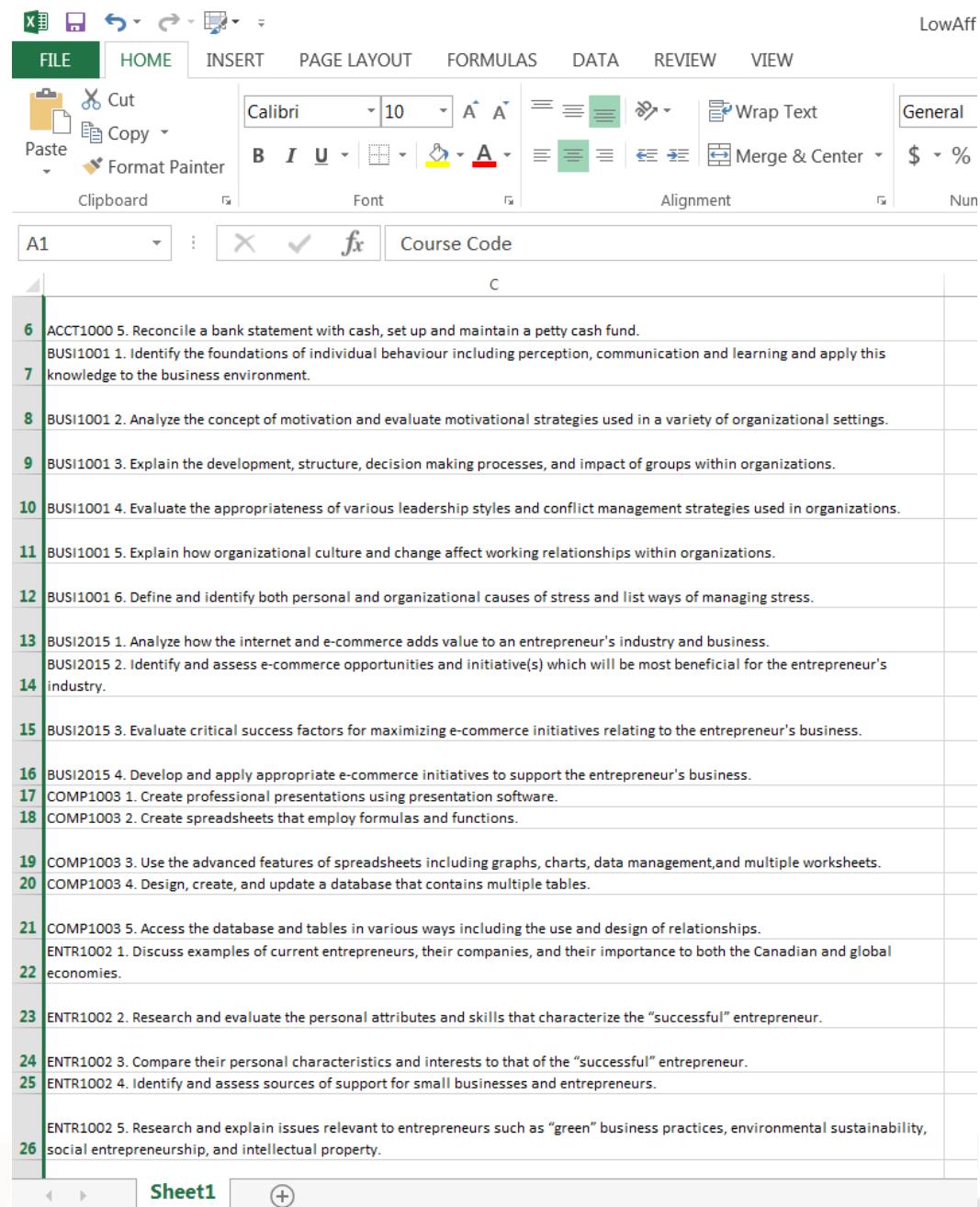
5. Assess the advantages and disadvantages of

B	C
MNGM4004 Governance & Leadership	1. Analyze theories, models, and strategies related to board and corporate governance.
MNGM4004 Governance & Leadership	2. Examine effective governance structures in action and propose responsive models that address board responsibilities vs. corporate executive roles.
MNGM4004 Governance & Leadership	3. Assess governance systems that reflect political, policy, and consent agenda frameworks.
MNGM4004 Governance & Leadership	4. Compare and contrast various leadership models including servant leadership and policy governance strategies.
MNGM4004 Governance & Leadership	5. Formulate effective response strategies to political, moral, and ethical challenges when dealing with boards and changes to board member structures.
MNGM4004 Governance & Leadership	6. Provide corrective solutions and methodologies while recognizing and responding to leadership challenges in the boardroom.
BSNS4006 Dispute Resolution for Leaders	1. Analyse how workplace disputes cause personal, professional, and organizational stress and dysfunction.
BSNS4006 Dispute Resolution for Leaders	2. Practice personal values and lead in an adversarial environment.

Nodes

Name
MNGM4004 Governance & Leadership
1. Analyze theories, models, and strategies related to board and corporate governance.
2. Examine effective governance structures in action and propose responsive models that address board responsibilities vs. corporate executive roles.
3. Assess governance systems that reflect political, policy, and consent agenda frameworks.
4. Compare and contrast various leadership models including servant leadership and policy governance strategies.
5. Formulate effective response strategies to political, moral, and ethical challenges when dealing with boards and changes to board member structures.
6. Provide corrective solutions and methodologies while recognizing and responding to leadership challenges in the boardroom.

Information Systems	information systems
MNGM4006 Management Information Systems	5. Assess the advantages and disadvantages of enterprise systems to business competitive advantage and the management of global corporations
MNGM4000 Strategic Management	Understand the process of forming, formulating, implementing and evaluating business strategies



FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW

Cut Copy Paste Format Painter Clipboard

Font Alignment

A1 Course Code

C

6 ACCT1000 5. Reconcile a bank statement with cash, set up and maintain a petty cash fund.
BUSI1001 1. Identify the foundations of individual behaviour including perception, communication and learning and apply this knowledge to the business environment.

8 BUSI1001 2. Analyze the concept of motivation and evaluate motivational strategies used in a variety of organizational settings.

9 BUSI1001 3. Explain the development, structure, decision making processes, and impact of groups within organizations.

10 BUSI1001 4. Evaluate the appropriateness of various leadership styles and conflict management strategies used in organizations.

11 BUSI1001 5. Explain how organizational culture and change affect working relationships within organizations.

12 BUSI1001 6. Define and identify both personal and organizational causes of stress and list ways of managing stress.

13 BUSI2015 1. Analyze how the internet and e-commerce adds value to an entrepreneur's industry and business.
BUSI2015 2. Identify and assess e-commerce opportunities and initiative(s) which will be most beneficial for the entrepreneur's industry.

15 BUSI2015 3. Evaluate critical success factors for maximizing e-commerce initiatives relating to the entrepreneur's business.

16 BUSI2015 4. Develop and apply appropriate e-commerce initiatives to support the entrepreneur's business.

17 COMP1003 1. Create professional presentations using presentation software.

18 COMP1003 2. Create spreadsheets that employ formulas and functions.

19 COMP1003 3. Use the advanced features of spreadsheets including graphs, charts, data management, and multiple worksheets.

20 COMP1003 4. Design, create, and update a database that contains multiple tables.

21 COMP1003 5. Access the database and tables in various ways including the use and design of relationships.
ENTR1002 1. Discuss examples of current entrepreneurs, their companies, and their importance to both the Canadian and global economies.

23 ENTR1002 2. Research and evaluate the personal attributes and skills that characterize the "successful" entrepreneur.

24 ENTR1002 3. Compare their personal characteristics and interests to that of the "successful" entrepreneur.

25 ENTR1002 4. Identify and assess sources of support for small businesses and entrepreneurs.

26 ENTR1002 5. Research and explain issues relevant to entrepreneurs such as "green" business practices, environmental sustainability, social entrepreneurship, and intellectual property.

Sheet1

Import Diploma Learning Outcomes (As Excel Spreadsheet)

BBA(M&L)withLowAffinityBusEntrepreneurship.nvp - NVivo Pro

CREATE DATA ANALYZE **QUERY** EXPLORE LAYOUT VIEW

Text Search Word Frequency Coding Matrix Coding Compound Last Run Query Add to Stop Words List Other Actions

Look for Search In Nodes Find Now Clear Advanced Find

Nodes

Name	Sources	References
MRKT1000 Introduction to Marketing	0	0
1. Analyze and discuss the role of marketing in business, industry, non-pr	1	6
2. Outline and explain key marketing theories and concepts	1	4
3. Evaluate an organization's current marketing activities and recommend	1	6
ACTG1000 Introduction to Accounting	0	0
Recognize, analyze and record business transactions using Canadian GAAP	1	1
Prepare financial statements for service and merchandising enterprises	1	2
Apply accounting principles in asset and liability valuation, and recognize th	0	0
Complete a manual and a computerized accounting simulation	1	2
MNGM1001 Management Principles	0	0
1. Explain the four management functions planning, organizing, leading and	1	3
2. Describe how Canadian business is affected by key business issues.	1	1
3. Analyze and apply management theory	1	1
4. Utilize the appropriate approach and analytical skills to address issues tha	1	3
MNGM1000 Leadership	0	0
1. Evaluate a variety of different leadership perspectives	1	1
2. Assess key leadership attributes based on current leadership theory	0	0
3. Differentiate between leadership and management characteristics and ski	0	0
4. Assess contingency based approaches and determine the most appropri	0	0
5. Appraise the relevance of various leadership styles given today's global m	0	0
6. Recommend the appropriate leadership strategy to ensure organizationa	0	0
7. Evaluate your leadership qualities and compose a personal development	0	0
INTS1002 Multidisciplinary Research	0	0

Drag selection here to code to a new node

In Nodes Code At

Nodes: 34 References: 207 Read-Only Unfiltered Row: 2 Column: 3

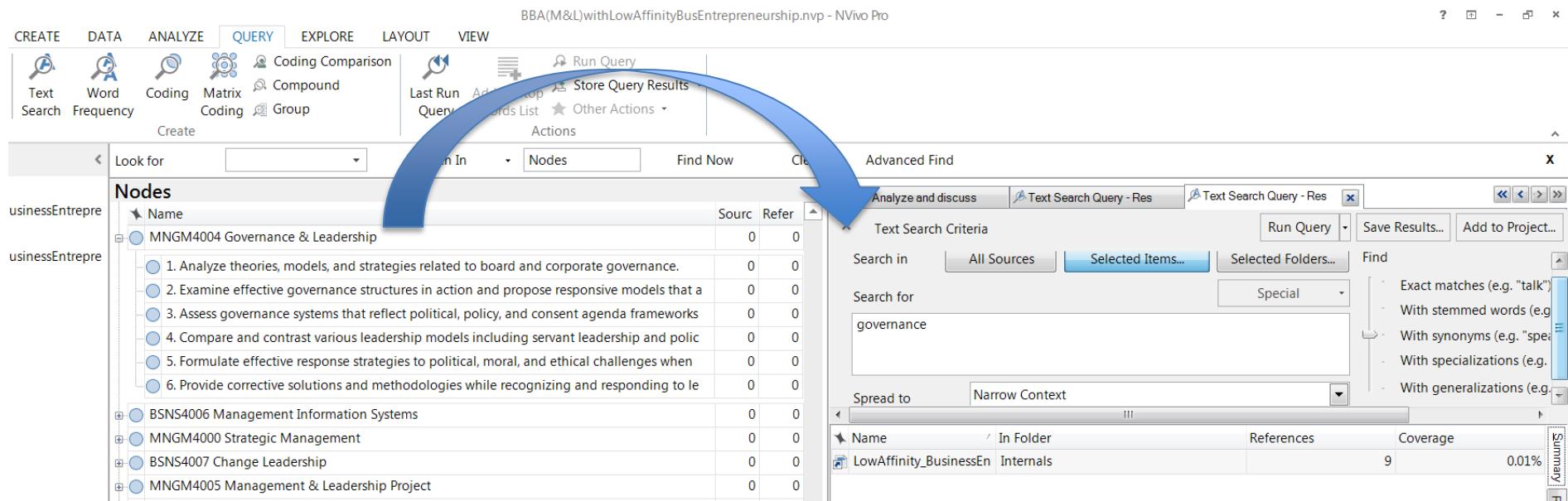
LowAffinity_BusinessEntr Text Search Query - Res 1. Analyze and discuss Text Search Query - R

ID	Course Code	Code and Learning Outcomes
1	ACCT1000	ACCT1000 1. Apply Generally Accepted Accounting Principles when recording business transactions; maintain a general ledger and prepare an unadjusted trial balance.
2	ACCT1000	ACCT1000 2. Prepare the necessary period end adjusting entries, adjusted trial balance, and financial statements for unincorporated operations; and complete the accounting cycle.
3	ACCT1000	ACCT1000 3. Identify all components of an income statement for a merchandising operation and prepare journal entries under the periodic and perpetual inventory systems.
4	ACCT1000	ACCT1000 4. Discuss the basic concepts and design of a manual accounting information system, special journals, and subsidiary ledgers.
5	ACCT1000	ACCT1000 5. Reconcile a bank statement with cash, set up and maintain a petty cash fund.
6	BUSI1001	BUSI1001 1. Identify the foundations of individual behaviour including perception, communication and learning and apply this knowledge to the business environment.
7	BUSI1001	BUSI1001 2. Analyze the concept of motivation and evaluate motivational strategies used in a variety of organizational settings.
8	BUSI1001	BUSI1001 3. Explain the development, structure, decision making processes, and impact of groups within organizations.
9	BUSI1001	BUSI1001 4. Evaluate the appropriateness of various leadership styles and conflict management strategies used in organizations.
10	BUSI1001	BUSI1001 5. Explain how organizational culture and change affect working relationships within organizations.

Record 2 of 85

1:45 PM 9/20/2016

Perform a Text Search for concepts related to the specific degree course



The screenshot shows the NVivo Pro interface with the title bar "BBA(M&L)withLowAffinityBusEntrepreneurship.nvp - NVivo Pro". The "QUERY" tab is selected in the top menu. A blue curved arrow points from the "Text Search" icon in the toolbar to the "Text Search Criteria" section of the query interface. The "Nodes" table on the left lists course codes and names, with the "MNGM4004 Governance & Leadership" node expanded to show its 6 associated activities. The "Text Search Criteria" panel on the right shows a search for "governance" in "Selected Items..." with "Narrow Context" selected for "Spread to".

Nodes

Name	Source	Reference
MNGM4004 Governance & Leadership	0	0
1. Analyze theories, models, and strategies related to board and corporate governance.	0	0
2. Examine effective governance structures in action and propose responsive models that a	0	0
3. Assess governance systems that reflect political, policy, and consent agenda frameworks	0	0
4. Compare and contrast various leadership models including servant leadership and polic	0	0
5. Formulate effective response strategies to political, moral, and ethical challenges when	0	0
6. Provide corrective solutions and methodologies while recognizing and responding to le	0	0
BSNS4006 Management Information Systems	0	0
MNGM4000 Strategic Management	0	0
BSNS4007 Change Leadership	0	0
MNGM4005 Management & Leadership Project	0	0

Text Search Criteria

Search in: All Sources

Search for: governance

Spread to: Narrow Context

LowAffinity_BusEn Internals

Using results of the text query assess the extent to which the highlighted diploma course learning outcomes match the learning outcomes from the degree course and “code” them to the appropriate degree learning outcome(s)

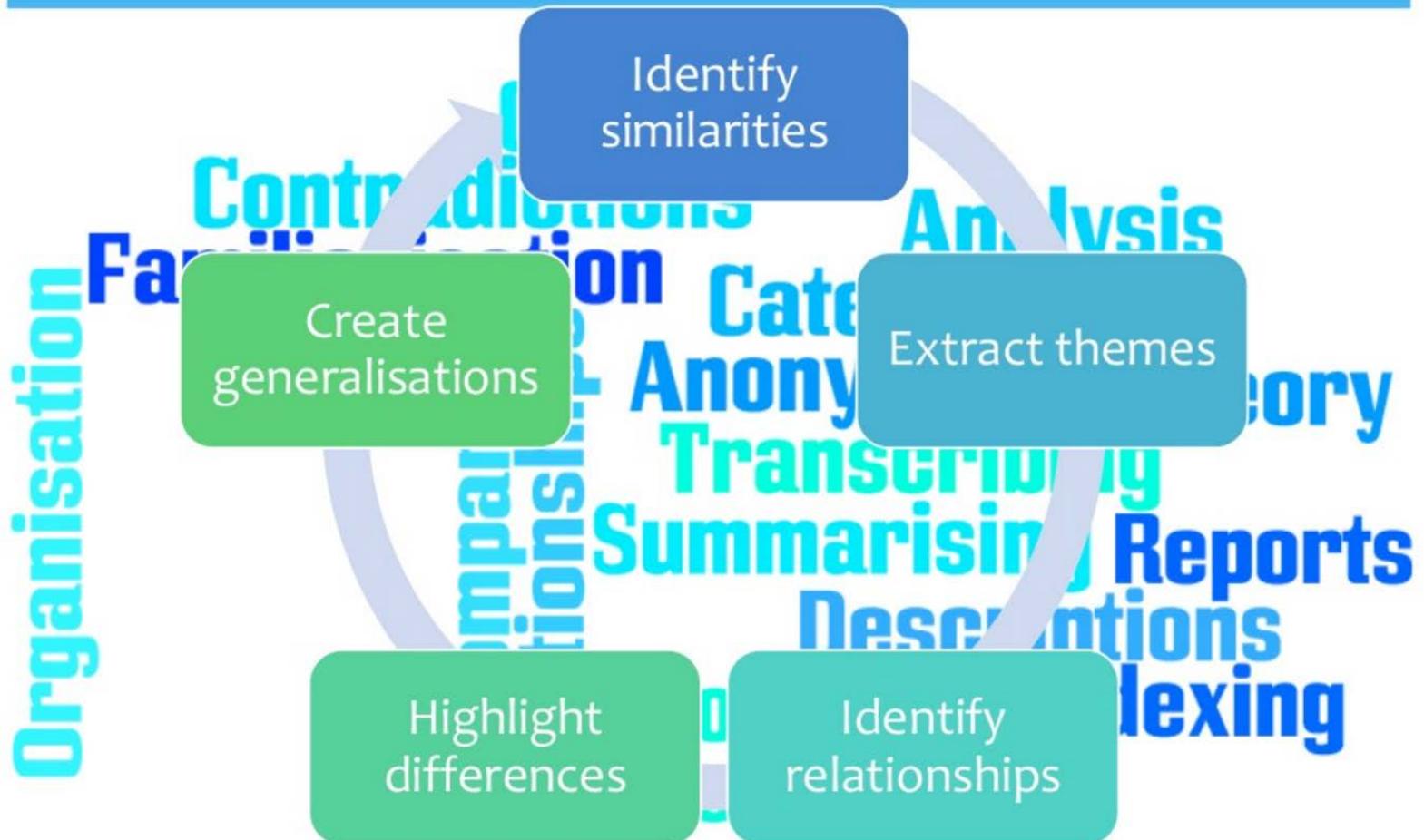
Results of diploma LO text query related to “Governance”

ID	Course Code	Code and Learning Outcomes
5	ACCT1000	ACCT1000 5. Reconcile a bank statement with cash, set up and maintain a petty cash fund.
6	BUSI1001	BUSI1001 1. Identify the foundations of individual behaviour including perception, communication and learning and apply this knowledge to the business environment.
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NVivo



Analysing Qualitative Data



Is there an affinity
between the
programs?

Identify
similarities

Create
generalisations

Extract themes

Highlight
differences

Identify
relationships

Is there an affinity
between the
programs?

Identify
similarities

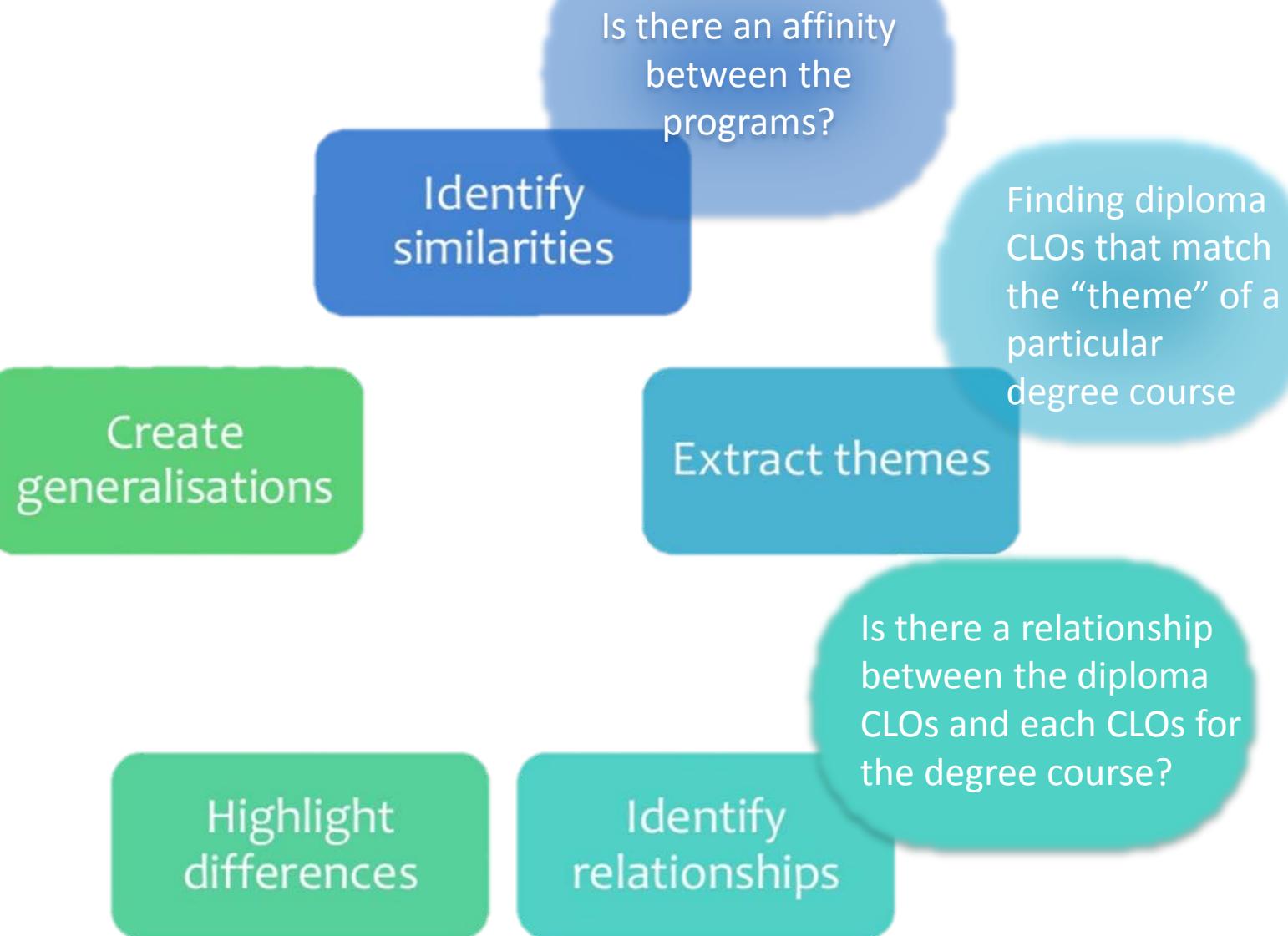
Finding diploma
CLOs that match
the “theme” of a
particular
degree course

Create
generalisations

Extract themes

Highlight
differences

Identify
relationships



Is there an affinity
between the
programs?

Identify
similarities

Finding diploma
CLOs that match
the “theme” of a
particular
degree course

Create
generalisations

Extract themes

Are there qualitative
or quantitative
differences in
comparing the CLOs

Highlight
differences

Identify
relationships

Is there a relationship
between the diploma
CLOs and each CLOs for
the degree course?

Can we make statements about whether specific Degree CLOs have been met in the diploma program

Create generalisations

Is there an affinity between the programs?

Identify similarities

Finding diploma CLOs that match the “theme” of a particular degree course

Extract themes

Are there qualitative or quantitative differences in comparing the CLOs

Highlight differences

Identify relationships

Is there a relationship between the diploma CLOs and each CLOs for the degree course?

Export a summary document, and colour code by fit...

Green Cells: Degree Course Learning Outcomes ARE covered by Diploma Course Learning Outcomes	Yellow Cells: Degree Course Learning Outcomes ARE PARTLY covered by Diploma Course Learning Outcomes	Red Cells: Degree Course Learning Outcomes ARE NOT covered by Diploma Course Learning Outcomes
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Hons. BBA (Management & Leadership) Gap Analysis from Business Diploma Program (May 2016)

Degree Course Name (Parent Node Name)	Degree Course Learning Outcome (Name)	Diploma Program Course Learning Outcomes Coded to the Degree CLO (Coded Text)
Nodes\\ACTG1000 Introduction to Accounting	Apply accounting principles in asset and liability valuation, and recognize the impact on financial statements	ACCT1003 1. Identify the basic accounting principles underlying the measurement and presentation of financial data ACCT1003 5. Identify the various ways of classifying and allocating costs ENTR2009 3) Construct a set of financial projections (cash flow, income statement and balance sheet) to assess the viability of a small business. FNCE2000 4. calculate the financial ratios used to evaluate the operating performance of a firm; FNCE2000 5. incorporate the risks and sensitivities of forecasting in the preparation of basic pro forma financial statements;
	Complete a manual and a computerized accounting simulation	ACCT1000 4. Discuss the basic concepts and design of a manual accounting information system, special journals, and subsidiary ledgers.
	Prepare financial statements for service and merchandising enterprises	ACCT1000 2. Prepare the necessary period end adjusting entries, adjusted trial balance, and financial statements for unincorporated operations; and complete the accounting cycle.

Consult with the Subject Matter Experts (faculty)



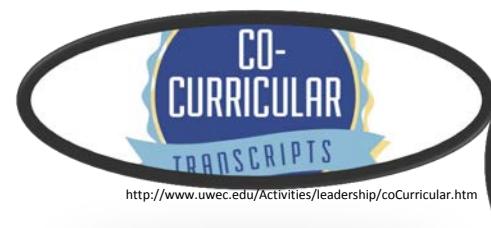
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Other Applications?

Co-curricular Activities



<http://www.uwec.edu/Activities/leadership/coCurricular.htm>



Volunteer Activities



Student Government



Community Service Learning

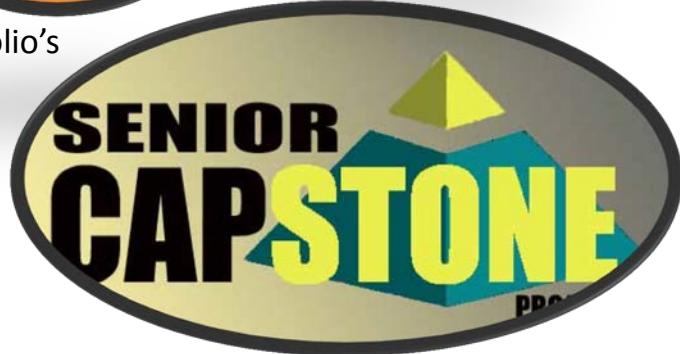
Classroom Assessment



E-Portfolio's



Assignment
S



Student Capstone Projects