



UNC  
THE ODUM INSTITUTE

**13<sup>th</sup> Annual  
Qualitative Research Summer Intensive  
July 25 – 29, 2016  
at the Carolina Inn in Chapel Hill, NC**

Hosted by:  
ResearchTalk, Inc.  
in partnership with  
the Odum Institute at UNC

## **Course Descriptions (Organized by Date)**

### **JULY 25-26 (two-day courses)**

**Course:**        *Crafting Phenomenological Research: How Phenomena Can Take Shape in Various Contexts*

**Instructor:**   Mark Vagle

**Dates:**         Monday-Tuesday, July 25-26

Phenomenology is a way for qualitative researchers to look *at* what we usually look *through*. It means being profoundly present in our research encounters, to leave no stone unturned, to slow down in order to open up, to dwell with our surroundings, and to know that there is “never nothing going on.” Because the philosophical ideas that underpin phenomenology can be abstract and sometimes elusive, this course will communicate these topics as concretely as possible. That is, the course will provide techniques, tools, and strategies for cultivating a phenomenology. We will use examples, anecdotes, and exercises to work through and navigate the craft.

To learn about phenomenological research approaches, we will experience a series of data collection tools and strategies such as going on “phenomenology walks,” writing about lived experiences, and interviewing one another. We will explore Vagle’s five-component methodological process for conducting post-intentional phenomenological research—working to make sense of how our phenomena might take shape in various contexts:

1. Identify a phenomenon in its multiple, partial, and varied contexts.

2. Devise a clear, yet flexible process for gathering data appropriate for the phenomenon under investigation.
3. Make a post-reflexivity plan.
4. Read and write your way through your data in a systematic, responsive manner.
5. Craft a text that captures tentative manifestations of the phenomenon in its multiple, partial, and varied contexts.

Finally, we will explore conventional and less-conventional ways to write up our research.

A wide variety of methodological and philosophical texts and examples of phenomenological studies will be on hand for participants to read and discuss during the course. The course is based on Vagle's book by the same name, *Crafting Phenomenological Research* (Left Coast Press, 2014).

**Course:** *Fundamentals of Qualitative Research*

**Instructor:** Johnny Saldaña

**Dates:** Monday-Tuesday, July 25-26

"Fundamentals of Qualitative Research" is an intensive two-day introductory overview of basic approaches to and methods for qualitative inquiry. Course content will be adapted from Saldaña's textbook, *Fundamentals of Qualitative Research* (Oxford University Press, 2011).

Major topics addressed will include: (1) genres, elements, and styles of qualitative research; (2) a survey of qualitative data collection methods; (3) qualitative research design; (4) a survey of qualitative data analytic methods; and (5) writing and presenting qualitative research. Multiple practical and on-your-feet activities will be included throughout the course to provide students experiential knowledge of the subject.

Novices to qualitative inquiry will benefit from this course by gaining literacy and workshop experience in the basic methods of qualitative research for future study and application. Experienced qualitative researchers may benefit from this course by refreshing their knowledge bases of methods, plus observing how introductory material is approached with novices for future classroom teaching applications.

**Course:** *Implementation Research: Using Qualitative Research Methods to Improve Policy and Practice*

**Instructor:** Alison Hamilton

**Dates:** Monday-Tuesday, July 25-26

Implementation research aims to integrate research findings into practice and policy. In order to improve the quality and effectiveness of routine practice, implementation researchers collect qualitative data about the everyday behaviors and beliefs of practitioners and other professionals, stakeholders, and recipients of services. During data collection, special attention is paid to factors that both facilitate and impede effective execution and implementation of

major programs and service delivery. The end goal is to increase the likelihood of uptake, adoption, implementation, and sustainability of evidence-based practices.

To provide foundational knowledge and skill to help facilitate your own work, the course walks through critical components of building and carrying out an implementation research project:

- ◇ Developing appropriate implementation research questions and specific aims
- ◇ Selecting conceptual models
- ◇ Strategizing about study design
- ◇ Determining appropriate, feasible qualitative data collection methods
- ◇ Executing qualitative analytic strategies
- ◇ Generating timely, impactful implementation research products

The application of methodological concepts will be illustrated via examples from implementation research in the context of varied settings such as healthcare organizations, educational institutions, and communities.

Participants will be provided with materials and bibliographies to support the practice of qualitative methods in implementation research.

**Course:** *'Sort and Sift, Think and Shift': Learning to Let the Data Guide Your Analysis*

**Instructor:** Ray Maietta

**Dates:** Monday-Tuesday, July 25-26

The *Sort and Sift* approach is an iterative process where analysts dive into data to understand its content, dimensions and properties, and then step back to assess what they have learned and to determine next steps. This process of “diving in” and “stepping back” is repeated throughout the analytic process. Researchers move from establishing an understanding of what is in the data to exploring their relationship to the data. To conclude, they arrive at an evidence-based meeting point that is a hybrid story of data content and researcher knowledge.

The Sort and Sift approach is defined by two key analytic shifts qualitative analysts must make over the course of their data work. Shift 1 occurs when analysts move their analytic plans from being driven by what they knew and thought before they collected and engaged with data to allowing data content to define analytic decision-making and directions. Shift 2 occurs as analysts move from processing individual data documents to giving careful thought and attention to what they will present and how this material will be presented to audiences.

This course focuses on a toolkit used during initial phases of data collection. This phase is driven by careful and thoughtful attention to core data segments within each data collection episode and the construction and analysis of episode profiles. Episode profiles feature the use of document inventories, diagrams and memos that work together to provide a detailed picture of the learning opportunities that arise within each individual data collection piece.

**Course:** *Writing Effective Qualitative and Mixed Methods Proposals*  
**Instructor:** Margarete Sandelowski  
**Dates:** Monday-Tuesday, July 25-26

The focus of this course is on concrete, this-is-how-you-might/should-say-it strategies for designing and writing competitive qualitative and mixed-methods research proposals. Qualitative and mixed-methods research proposals are exercises in artful and mindful design, verbal precision, imaginative and informed rehearsal, elegant expression, and strategic disarmament. We will cover principles generic to proposals, and specific ways to communicate the significance, conceptual framing, methodological details (sampling and data collection and analysis plans, plans for optimizing validity and human subjects protections) of, and budget and budget justification for, the planned study. We will also cover strategies for addressing those aspects of qualitative and mixed-methods research designs likely to arouse the most concern among reviewers less familiar with them, most notably the purposeful sampling frame and generalizability of study findings. This course is appropriate for graduate students and faculty in the practice disciplines (e.g., clinical psychology, education, medicine, nursing, public health, social work) as well as researchers from other fields of study (e.g., sociology, anthropology).

In addition to didactic instruction, handouts, and a suggested reference list, the course will include an interactive session where participants will have the opportunity, as time permits, to ask questions about their own proposals for problem solving.

**Course:** *Writing Rites: Working on Your Analysis and Writing*  
**Instructor:** Kathy Charmaz  
**Dates:** Monday-Tuesday, July 25-26

What makes one qualitative study much more compelling than others? How can the writing strategies of professional writers help us improve our work? How do you manage to write when you work in a setting that allows scant time for writing? Would you like to expedite analyzing your data and writing your report? Which strategies help you gain acceptance and admiration from your intended audiences? This class addresses these questions.

Qualitative reportage relies on art and science. Learning how to construct an artful rendering of your work increases the power of your analysis. This class covers both professional writers' tips and tricks and qualitative analysts' strategies and shortcuts. It will help you develop a more incisive, creative, and clear narrative. Our approach emphasizes how to construct a creative analysis and to write it for varied audiences. You will gain fresh ideas for proceeding with the analysis, integrating your ideas into a cogent, coherent piece of work, and communicating the significance of your work.

This class covers crafting research stories and writing analytic reports, but the two are not separate endeavors. Thus we show how to bring analytic definition and logic to stories and to build imagery, rhythm, metaphor, and surprise into analytic reports. We also cover strategies for developing arguments, writing literature reviews and theoretical frameworks and integrating your manuscripts. Writing abstracts, titles, and introductions share problems and

pitfalls. Our agenda includes learning a few tricks to help you resolve these problems and avoid the pitfalls. The last session focuses on choosing journals and publishing houses, preparing your manuscript for submission, and working with editors and reviewers.

This class best serves participants who are in the midst of a qualitative project or have had some experience with qualitative research and have engaged in qualitative coding and memo writing. Writers of all types of qualitative research are welcome. Researchers who conduct ethnographies, use discourse analysis, engage in narrative inquiry, follow grounded theory strategies, or create personal narratives will all gain ideas and strategies to advance their work.

## JULY 27 (One-Day Courses)

**Course:** *Analyzing Online Conversations: A Research Framework*

**Instructor:** Trena Paulus

**Dates:** Wednesday, July 27

This course introduces participants to a research framework to guide the process of analyzing online conversations. From social media to online support groups to massive open online courses (MOOCs), conversations on the Internet have long been of interest to qualitative researchers in a variety of fields who seek to identify the insights and transformations that take place there. While much of the early studies in this area have relied on content analysis methods, this course will familiarize participants with a variety of qualitative methods for analyzing online conversations.

Participants will learn how to:

- Identify underlying theoretical assumptions that impact research design
- Generate and/or capture relevant online conversational data in an ethical manner
- Select data analysis methods that ensure methodological alignment

This framework will assist researchers in creating conceptually congruent research designs to answer important questions about what is happening in online conversations.

Topics will include:

- Understanding the distinction between language as *representation* vs. language as *construction*
- Ensuring methodological alignment when designing studies of online conversations
- Crafting a taxonomy of online conversations and typical analytic approaches
- *Generating* new online conversations vs. *capturing* existing online conversations
- Resolving ethical dilemmas surrounding the analysis of online conversations
- Selecting appropriate technologies for working with online conversations
- Analyzing online conversations using thematic, narrative and discursive techniques
- Establishing the quality of the findings

**Course:** *Building a Codebook and Writing Memos*

**Instructor:** Paul Mihas

**Dates:** Wednesday, July 27

This course focuses on developing codes and integrating memo writing into a larger analytic process. Coding and memo writing function as simultaneous and fluid tasks that occur during actively reviewing of interviews, focus groups, and multi-media data. We will discuss deductive and inductive codes and how a codebook can evolve, that is, how codes can emerge and shift unexpectedly during analysis. Managing codes also includes developing code connections and possible hierarchies, identifying code “constellations,” and building multidimensional themes. Our discussion of codes will include the following topics:

- The importance of code names and definitions
- Deductive, inductive, and thematic codes
- How many codes are too many?
- How broad or specific should codes be?

Memos function as deep reflections that capture nuanced thoughts and cumulative reactions to data. Memo writing strategies help us capture analytical thinking, inscribed meaning, and cumulative evidence for emerging meaning. Memos can also resemble early writing for reports, articles, chapters, and other forms of presentation. Researchers can also mine memos for codes and incorporate memos in building evocative themes and theory. The following types of memos and memo-writing will be discussed in an effort to offer strategies to begin applying these techniques to your own work: holistic memos, positionality memos, statement memos, thematic memos, and memos that engage critical data segments.

**Course:** *Creating Credible, Vivid, and Persuasive Qualitative Stories: Research as Performance*

**Instructor:** Johnny Saldaña

**Dates:** Wednesday, July 27

An arts-based approach can enrich our understanding of how people experience their worlds. When the audiences of our research hear poems and see plays that portray the themes and meanings in our data, they witness the power of nuance and the integrated nature of qualitative findings. Our audiences become more present in our story telling and are more likely to absorb the multi-dimensional messages we convey.

Johnny Saldaña, one of the best known practitioners of this research tradition, will guide participants through improvisational and writing exercises to explore how dramatic texts add credibility and make presentations more vivid and persuasive. These skills will help researchers document and represent fieldwork ranging from education to health care.

The course will also provide a literature review of exemplary play scripts and videos in research-based theatre; methods of dramatizing field notes and adapting interview transcripts; and the developmental process of autoethnographic monologues. Throughout, Saldaña emphasizes the vital importance of creating good theatre as well as good research for impact on an audience and performers.

Key figures in qualitative inquiry, Norman Denzin and Yvonna Lincoln, endorse the arts-based research techniques outlined and supported in this course as a powerful way for ethnographers to interrogate and represent the meanings of lived experiences.

No prior theatre or performance experience is needed to participate in this workshop.

**Course:** *Designing, Using, and Evolving Qualitative Interview and Focus Group Guides*

**Instructor:** Alison Hamilton

**Dates:** Wednesday, July 27

Interview/focus group guides are tools for prompting people to share their stories and perspectives on particular topics. This course will position you to develop an active posture toward initial development of an interview/focus group guide and prepare you to engage actively and evolve the fit of your guide to what you experience and learn in the field.

The eight strategies listed here will serve as an action plan to accomplish this goal:

Aligning	Following
Preparing	Shifting/adjusting
Opening	Closing
Asking	Processing

- ✓ *Aligning:* What is the overall point of the interview or focus group? How do the questions in your interview/focus group guide assist you in achieving project goals?
- ✓ *Preparing:* Who are your participants? How does knowledge of the participants inform questioning format and approach? How do you ensure (e.g., through pilot testing, think-aloud methods) that the questions you develop are relevant and aligned with project goals? How do you foster a sense of ownership for participants in the data collection experience?
- ✓ *Opening:* What are ways to open the conversation appropriately and comfortably?
- ✓ *Asking:* What do you ask participants when and why? What questions open conversation topics? When and how do you probe and ask for further detail and example?
- ✓ *Following:* How do you manage the conversation in a way that allows you to follow your participants' unfolding narratives while keeping them interested and involved in their own story telling?
- ✓ *Shifting/adjusting:* When and why do you make adjustments to the interview or focus group? How can you shift your approach, language, and direction on the spot as you listen to people's unfolding narratives?
- ✓ *Closing:* How can you naturally and affirmatively reach the conclusion of the data collection episode?
- ✓ *Processing:* How do you track and understand the evolution of your interview/focus group guide and process the meanings these changes have for your project?



Employing these strategies through the life of your project will enhance the quality of the data you collect. This practice will also help you to understand how the conversations occurring during data collection fit what is currently known about, and practiced in, your field.

**Course:** *Foundational Principles of and Approaches to Mixed Methods Research*

**Instructor:** Margarete Sandelowski

**Dates:** Wednesday, July 27

The focus of this course is on primary mixed-methods studies and programs of research. We will cover misconceptions about mixed methods research, key points of interface between “qualitative” and “quantitative” methods and data, and the problems posed by the qualitative/quantitative binary foundational to the “mix” in mixed methods.

Also covered will be issues concerning and techniques for combining:

- Purposeful and probability sampling frames
- Minimally structured and open-ended and highly structured and closed-ended data collection approaches
- Textual and statistical analysis strategies
- Approaches for the integration of diverse data sets, including linking and assimilation techniques

This course is appropriate for graduate students and faculty in the practice disciplines (e.g., clinical psychology, education, medicine, nursing, public health, social work) as well as researchers from other fields of study (e.g., sociology, anthropology).

**Course:** *Learning from Lived Experience: How We Can Study the World as It Is Lived*

**Instructor:** Mark Vagle

**Dates:** Wednesday, July 27

This workshop will explore what “lived experience” means for qualitative researchers and how we can study the world as it is lived, not the world as it is measured, transformed, represented, correlated, and broken down. In paying close attention to lived experience, we are interested in the felt and sensed aspects of our participants’ and our own experiences, as well as the contextual aspects in which these experiences are lived. How can we listen to and make sense of this significance and use it in our qualitative research?

We will identify lived experiences that we are interested in studying and use theoretical tools from phenomenological traditions to explore how we can open up, wonder about, and understand these experiences more deeply. We will treat theorizing as an active and generative process of exploration.

We will also put these theoretical tools to use in our data collection processes—focusing on observing and interviewing lived experiences. As a concrete example, we will spend time exploring how various visual and popular media can serve as data for studying lived experience.

With data from some of Vagle's current studies of social class lived experiences in schools and communities, we will further practice data analysis using the theoretical tools we have learned. Participants are also encouraged to bring their own data and/or research ideas so they can apply these tools and techniques to their work.

## **JULY 28 - 29 (Two-Day Courses)**

**Course:** *Coding and Analyzing Qualitative Data*

**Instructor:** Johnny Saldaña

**Dates:** Thursday-Friday, July 28-29

This two-day workshop focuses on a range of selected methods of coding qualitative data for analytic outcomes that includes patterns, categories, themes, processes, and causation. The course will also touch upon how these methods fit with or differ from coding strategies in grounded theory and phenomenology.

The workshop will address:

- Various coding methods for qualitative data (interview transcripts, field notes, documents)
- Analytic memo and vignette writing
- Heuristics for thinking qualitatively and analytically

Manual (hard copy) coding will be emphasized with a discussion of available analytic software for future use. Workshop content is derived from Saldaña's *The Coding Manual for Qualitative Researchers* (3rd ed., Sage Publications, 2016).

**Course:** *Designing and Making Decisions in Qualitative Data Collection Projects*

**Instructor:** Mark Vagle

**Dates:** Thursday-Friday, July 28-29

At first blush, decisions regarding data collection can seem straightforward and clear. In this workshop, we will consider how data collection is more complicated and dynamic than it may first appear. We will begin by cultivating a set of principles that can direct a comprehensive approach to designing and carrying out qualitative data collection projects.

Four core data collection principles:

1. Successful data collection depends on how we as researchers employ a posture of openness, flexibility, and responsiveness in our data collection practices.
2. The phenomenon (case, problem, context, etc.) possesses properties, dimensions, and dynamics that we must become aware of as a first step to directing decision making that will continue throughout the data collection process. In other words, the phenomenon calls for how it should be studied.
3. Considerations of ethical, political, and social implications related to our study, our participants, and the communities in which our study is located must guide and direct our practices. Paying attention to these issues from the onset encourages a posture of inclusiveness and avoids potential obstacles that arise from a disconnect with study participants.

4. Researcher reflexivity throughout the data collection process helps us distinguish what is purely in and directed by the data and how our attitudes and behaviors, intentionally or not, may direct our practices.

Using these principles, we will work through a number of ways to talk to people (interviews, focus groups, informal conversations); observe people and places (structured, semi-structured, unstructured, short-term, long-term, participatory); and examine artifacts (content analysis, policy analysis, discourse analysis). In addition, we will consider how forms of visual art, film, popular media, historical documents, poetry, and theory can be used as important forms of data collection in qualitative research.

**Course:** *Digital Tools for Qualitative Research*

**Instructor:** Trena Paulus

**Dates:** Thursday-Friday, July 28-29

This course introduces participants to how both free and proprietary technologies can be used to support the *entire* qualitative research process, including: engaging in reflexivity, networking through social media, collaborating with colleagues, conducting paperless literature reviews, collecting data through mobile apps and from social media, creating a “hands-free” transcribing process, analyzing text and multi-media data, and writing through storyboarding.

While most researchers know about and understand the benefits of qualitative data analysis software (QDAS) packages such as ATLAS.ti, NVivo and MAXQDA, fewer have thought about the ways new digital tools may impact every aspect of our work as researchers. Not only will participants gain a comprehensive introduction to the most recent digital tool developments as they apply to qualitative research, but, through detailed demonstrations by the instructor, they will also learn how to analyze critically the affordances and constraints of such tools and the ethical implications of their use.

Topics and tools will include:

- Networking and collaborating through academic social media platforms (Academia.edu, Google Scholar profiles, and ResearchGate)
- Developing a paperless literature review process using cloud storage (Dropbox), citation management software (Mendeley), annotating apps (GoodReader), and QDAS tools (ATLAS.ti and NVivo)
- Collecting data through mobile apps (ATLAS.ti, Evernote) and social media sites (QSR NVivo's NCapture tool)
- Engaging in reflexivity and collaborating with colleagues and participants through cloud-based notebooks (Evernote) and blogging platforms (Blogger and Feedly)
- Transcribing in ways that synchronize the media file with the text (Inqscribe) and enable "hands-free" transcription (Dragon Dictate)
- Selecting an appropriate qualitative data analysis software package (e.g. deDoose, ATLAS.ti, MAXQDA, NVivo, Quirkos)

- Analyzing multi-media data (Transana)
- Writing long documents through storyboarding (Scrivener)

The purpose of the workshop is to provide a comprehensive *demonstration*, rather than a *tutorial*, of how these digital tools can support efficient, effective, and theoretically-grounded methodological work.

**Course:**        ***Introduction to Grounded Theory: A Social Constructionist Approach***

**Instructor:**   **Kathy Charmaz**

**Dates:**        **Thursday-Friday, July 28-29**

This class introduces grounded theory methods from a social constructionist approach to new and experienced qualitative researchers. You will gain practical guidelines for handling data analysis, a deeper understanding of the logic of grounded theory, and strategies for increasing the theoretical power and reach of your work. I treat grounded theory as a set of flexible guidelines to adopt, alter, and fit particular research problems, not to apply mechanically. With these guidelines, you expedite and systematize your research. Moreover, using grounded theory sparks fresh ideas about your data. The sessions cover an overview of basic guidelines and hands-on exercises. I offer ideas about data gathering and recording to help you obtain nuanced, rich data. We discuss relationships between qualitative coding, developing analytic categories and generating theory and attend to specific grounded theory strategies of coding, memo-writing, theoretical sampling, and using comparative methods. You will receive guided practice in using each analytic step of the grounded theory method.

If you have collected some qualitative data, do bring a completed interview, set of fieldnotes, or document to analyze. If you do not have data yet, we will supply qualitative data for you. If you prefer to use a laptop for writing, bring one, but you can complete the exercises without a computer.

**Course:**        ***Mixed Methods: Bridging Qualitative and Quantitative Methods and Results***

**Instructor:**   **Alison Hamilton**

**Dates:**        **Thursday-Friday, July 28-29**

A researcher or research team pursues a mixed methods approach to understand a given topic or phenomenon more deeply when numbers or narratives alone do not provide a complete picture. Combining qualitative and quantitative approaches can enhance conversations about theory and/or inform the evolution of practice and policy. This complex and demanding research paradigm requires knowledge, skill, and expertise in quantitative and qualitative methods, as well as the art of carefully integrating the approaches to and findings from each mode of inquiry.

This course focuses on strategies, tips, and best practices to accomplish this integration in accessible and effective ways, including:

- Rationales to guide decision making related to study design and execution. For example:

- Will the qualitative and quantitative data collection efforts occur concurrently or sequentially, and why?
- Will either the qualitative or quantitative be privileged or will each contribute equally to answering the research questions and generating the project's final products?
- How much time will be allocated to integration and/or subsequent data collection phases?
  - What factors will contribute to the timing of the integration and phasing of data collection?
- What expertise and resources are needed?
- What are the priority end products and how does the integrated analytic plan lead to those products?
- Conceptual, theoretical, and/or logic models as roadmaps to set the stage for and guide integration.
- Analytic strategies that advance frameworks and processes of connecting, building, merging, embedding, and bridging. For example:
  - The power and role of using data displays and visual diagramming during the analytic process, e.g., side-by-side comparisons, integrated matrices, joint displays.
- Qualities of good reporting and attributes of good mixed methods articles.

**Course:**        ***Shifting Analytic Direction with Final Products in Mind: Using the 'Sort and Sift' Toolkit***

**Instructor:**   **Ray Maietta and Kevin Swartout**

**Dates:**        **Thursday-Friday, July 28-29**

In every qualitative project there is a point where analysts move from processing individual data documents to giving careful thought and attention to what content they will present and how this material will be presented to audiences. Phase 2 of ResearchTalk's *Sort and Sift, Think and Shift* analysis process is driven by a toolkit that directs this important shift in the analysis process. This toolkit can be used regardless of whether or not you employed earlier phase *Sort and Sift* techniques.

A first beneficial step in this transition involves mining through memos, code topics, document summaries and episode profiles. As researchers review their analytic work, memoing and diagramming techniques help them discover, understand and document important connections within and across data documents.

A second component of this transition features a question and answer procedure we call "bridging." Two bridging tools we highlight are a "story evolution tool" and a "code combination tool." The story evolution tool introduces a process of interrogating data to understand better how key actors, places, time periods, actions, attitudes and emotions interact in the lives of our participants. The code combination tool introduces a set of techniques to discern shared meaning between and among code categories.

## **Instructor Bios (Organized Alphabetically)**

### ***Kathy Charmaz***

Kathy Charmaz is Professor of Sociology and Director of the Faculty Writing Program at Sonoma State University. In the latter position, she leads seminars for faculty to help them complete their research and scholarly writing. She has written, co-authored, or co-edited fourteen books including two award-winning books, *Constructing Grounded Theory: A Practical Guide Through Qualitative Analysis* and *Good Days, Bad Days: The Self in Chronic Illness and Time*. The considerably expanded second edition of *Constructing Grounded Theory* recently appeared as did a co-edited Sage Publications four-volume set, *Grounded Theory and Situational Analysis* with senior editor, Adele Clarke. Her co-edited volume with senior editor Antony Bryant, *The Sage Handbook of Grounded Theory*, appeared in 2007. Professor Charmaz is a co-author of two multi-authored methodology books, *Five Ways of Doing Qualitative Analysis: Phenomenological Psychology, Grounded Theory, Discourse Analysis, Narrative Research, and Intuitive Inquiry*, which came out in 2011 with Guilford, and *Developing Grounded Theory: The Second Generation*, a 2009 publication with Left Coast Press. She has also published numerous articles and chapters on the experience of chronic illness, the social psychology of suffering, writing for publication, and grounded theory and qualitative research. Professor Charmaz has served as President of the Pacific Sociological Association, President and Vice-President of the Society for the Study of Symbolic Interaction, Vice-President of Alpha Kappa Delta, the international honorary for sociology, editor of *Symbolic Interaction*, and Chair of the Medical Sociology Section of the American Sociological Association. She has received the Feminist Mentors Award and the George Herbert Mead award for lifetime achievement from the Society for the Study of Symbolic Interaction. She lectures and leads workshops on grounded theory, qualitative methods, medical sociology, and symbolic interactionism around the globe.

### ***Alison Hamilton***

Alison B. Hamilton, Ph.D., M.P.H., an Associate Research Anthropologist in the UCLA Department of Psychiatry and Biobehavioral Sciences, received her Ph.D. in medical and psychological anthropology from UCLA in 2002, and her M.P.H. in Community Health Sciences from UCLA in 2009.

Dr. Hamilton is the Director of the VA-funded EMPOWER (Enhancing Mental and Physical Health of Women through Engagement and Retention) Quality Enhancement Research Initiative (QUERI), focused on improving women Veterans' health and health care through implementation science. She is a Research Health Scientist and Director of the Qualitative Methods Group at the VA Health Services Research and Development (HSR&D) Center for the Study of Healthcare Innovation, Implementation and Policy, specializing in women Veterans' health, mental health services research, and implementation science. She was a fellow in the inaugural cohort of the NIMH/VA Implementation Research Institute and she serves on the editorial boards of *Implementation Science* and *Women's Health Issues*. She currently leads two HSR&D-funded women's health studies, including a four-year mixed methods study of women

Veterans' attrition from VA healthcare use and a multisite study of improving multilevel stakeholder engagement in women's health services research.

Dr. Hamilton has been a consultant with ResearchTalk for over 17 years, providing direct support to clients as well as serving as faculty for several of the Qualitative Research Summer Intensives and mentor at ResearchTalk's Qualitative Data Analysis Camps. At recent Intensives, she taught courses on rapid qualitative research methods, qualitative grant-writing, qualitative interviewing, mixed methods research, and enhancing the usefulness of qualitative research. Dr. Hamilton is a co-author on Dr. Ray Maietta's *Sort and Sift, Think and Shift* forthcoming publication.

### **Ray Maietta**

Raymond C. Maietta, Ph.D. is president of ResearchTalk Inc., a qualitative research consulting company based in Long Island, New York and Cary, North Carolina. A Ph.D. sociologist from the State University of New York at Stony Brook, with postdoctoral training at Indiana University, Ray's interests in the art of qualitative research methods motivated him to start ResearchTalk in 1996. ResearchTalk Inc. provides project consultation and co-analysis services on all phases of qualitative analysis to university, government, not-for-profit, and corporate researchers.

More than 20 years of consultation with qualitative researchers informs Dr. Maietta's publications and a current methods book he is writing:

- "Systematic Procedures of Inquiry and Computer Data Analysis Software for Qualitative Research," co-authored with John Creswell, in *Handbook of Research Design and Social Measurement* (Sage Publications, 2002)
- "State of the Art: Integrating Software with Qualitative Analysis" in *Applying Qualitative and Mixed Methods in Aging and Public Health Research*, edited by Leslie Curry, Renee Shield, and Terrie Wetle (American Public Health Association and the Gerontological Society of America, 2006).
- "The Use of Photography As a Qualitative Research Method" in *Visualizing Social Science*, edited by Judith Tanur (Social Science Research Council, 2008).
- "Qualitative Software" in the *Sage Encyclopedia of Qualitative Research Methods*, edited by Lisa Given (Sage Publications, 2008).
- "Integrating Qualitative and Quantitative Analysis with MAXQDA" in *Journal of Mixed Methods* (Sage Publications, April 2008)
- "The Symbolic Value and Limitations of Racial Concordance in Minority Research Engagement", co-authored with Craig S. Fryer, Susan R. Passmore, et al., in *Qualitative Health Research*, March 13, 2015 (Sage Publications)
- *Sort and Sift, Think and Shift*, in progress.

Ray's work invites interactions with researchers from a range of disciplinary backgrounds. He is an active participant at conferences around the country including invited presentations at



American Evaluation Association, American Anthropological Association, and American Sociological Association.

### ***Paul Mihas***

Paul Mihas is a senior social research associate specializing in qualitative research at the Odum Institute for Research in Social Science at the University of North Carolina at Chapel Hill. In this role, he regularly advises graduate students and faculty on qualitative methods, software, and strategies for analysis. He is the former managing editor of *Social Forces*, a journal of sociology published at the University of North Carolina Press. As a qualitative analysis consultant with ResearchTalk (since 2001), Mihas has lectured on qualitative methods and strategies for analysis at several universities, including the University of Puerto Rico, Howard University, and Temple University. He has also served as faculty at the annual Qualitative Research Summer Intensive and a mentor at ResearchTalk's Qualitative Data Analysis Camps. His interests include memo writing as a stand-alone method; his current research focuses on cancer survivors and metaphors for illness and the body. Mihas received an M.A. (1989) from the University of North Carolina at Chapel Hill. Mihas is a co-author on Dr. Ray Maietta's *Sort and Sift, Think and Shift* forthcoming publication.

### ***Trena Paulus***

Dr. Trena Paulus, Ph.D., is a Professor of Qualitative Research Methods at the University of Georgia in Athens, GA, USA. She is author of *Digital Tools for Qualitative Research* (Sage Publications, 2014, with Jessica Lester and Paul Dempster.) Dr. Paulus has published over 40 peer-reviewed journal articles on topics related to qualitative research, language-based methodologies for investigating online conversations, computer-mediated communication and online learning. She teaches courses and advises graduate students on qualitative research methods, digital tools for qualitative research, analysis of online data, and discourse analysis. She is a founding member of the Microanalysis of Online Data international network and the International Congress of Qualitative Inquiry's new special interest group on Digital Tools for Qualitative Research. She is a certified professional trainer for ATLAS.ti and an Affiliate of the Center for Computer-Mediated Communication at Indiana University. She regularly consults and provides workshops on the use of digital tools in a variety of research contexts in the USA and internationally. She is currently working on a methodological text on analyzing online conversations for evidence of learning.

### ***Johnny Saldaña***

Johnny Saldaña is Professor Emeritus from the Herberger Institute for Design and the Arts' School of Film, Dance, and Theatre at Arizona State University where he taught from 1981 to 2014. He has been involved in the field of theatre education as a teacher educator, drama specialist, director, playwright, and researcher. Saldaña's research methods in longitudinal qualitative inquiry, ethnodrama, and qualitative coding and data analysis have been applied and cited by researchers for over 2,500 studies conducted in over 100 countries in disciplines

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Mr. Saldaña is the author of *Longitudinal Qualitative Research: Analyzing Change Through Time* (AltaMira Press, 2003), a research methods book and recipient of the 2004 Outstanding Book Award from the National Communication Association's Ethnography Division; *Ethnodrama: An Anthology of Reality Theatre* (AltaMira Press, 2005), an edited collection of ethnographic-based plays; *Fundamentals of Qualitative Research* (Oxford University Press, 2011), an introductory textbook; *Ethnotheatre: Research from Page to Stage* (Left Coast Press, 2011), a playwriting primer for performance ethnography and recipient of the 2012 American Educational Research Association's Outstanding Book Award; *The Coding Manual for Qualitative Researchers, 3rd ed.* (Sage Publications, 2016), a handbook on qualitative data analysis; *Thinking Qualitatively: Methods of Mind* (Sage Publications, 2015), a reader on epistemologies for inquiry; and the 3rd edition of the late Matthew B. Miles and A. Michael Huberman's *Qualitative Data Analysis: A Methods Sourcebook* (Sage Publications, 2014). He is currently at work on a revised edition of *Fundamentals of Qualitative Research*; and, with co-author Matt Omasta, a new research methods textbook for Sage Publications, *Qualitative Research: Analyzing Life*.

### **Margarete Sandelowski**

Margarete Sandelowski is Cary C. Boshamer Distinguished Professor at the University of North Carolina at Chapel Hill School of Nursing. She directs and is principal faculty in the summer programs in qualitative and mixed-methods research offered through the Center for Lifelong Learning at the School of Nursing. She has published widely in refereed nursing, interdisciplinary health, and social science journals (e.g., *Field Methods, Journal of Mixed Methods Research, Qualitative Health Research, Research in Nursing and Health, Social Science and Medicine*) and anthologies in the domains of gender and technology, and qualitative and mixed-methods research (both primary research and research synthesis). Her works have been translated into Spanish and Japanese.

Among her books are *Handbook for Synthesizing Qualitative Research* (Springer, 2007) and *With Child in Mind: Studies of the Personal Encounter with Infertility* (University of Pennsylvania Press, 1993), which was awarded the 1994 Eileen Basker Memorial Prize from the Society for Medical Anthropology of the American Anthropological Association. Among her book chapters are "Synthesizing Qualitative and Quantitative Research Findings," by M. Sandelowski, C.I. Voils, J. Crandell, and J. Leeman in *Routledge International Handbook of Qualitative Nursing Research*, edited by C.T. Beck (Routledge, 2013); "On Quantitizing," by M. Sandelowski, C.I. Voils, and G. Knafl in *Sage Quantitative Research Methods: Vol.1. Fundamental Issues in Quantitative Research*, edited by W.P. Vogt (Sage Publications, 2011); "Current Practices and Emerging Trends in Conducting Mixed-Methods Intervention Studies in the Health Sciences," by M. Song, M. Sandelowski, and M.B. Happ in *Sage Handbook of Mixed Methods in Social and Behavioral Research* (2d ed.), edited by A. Tashakkori and C. Teddlie (Sage Publications, 2010); "Writing the Proposal for a Qualitative Research Methodology Project," by M. Sandelowski in *Qualitative*

*Research 2* (vol. 2), edited by A. Bryman (Sage Publications, 2007); “Tables or Tableaux? Writing and Reading Mixed Methods Studies,” by M. Sandelowski in *Handbook of Mixed Methods in Social and Behavioral Research*, edited by A. Tashakkori and C. Teddlie (Sage Publications, 2003).

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### **Kevin Swartout**

Kevin Swartout is an Assistant Professor in the Departments of Psychology and Public Health at Georgia State University in Atlanta, GA. He earned his Ph.D. in 2011 from the University of North Carolina at Greensboro. His research focuses on violence and aggression, specifically how it relates to social influences and substance use, as well as trajectories of violent behavior and victimization across time. He was a recipient of the 2010 Young Investigator Award from the International Society for Research on Aggression. Dr. Swartout has published several peer-reviewed articles and frequently speaks at national and international conferences. He has been a qualitative research consultant with ResearchTalk Inc for over eight years. In this capacity, he has regularly taught short courses on mixed methods and qualitative software, including workshops at ResearchTalk and Temple University’s “Planning for Qualitative Research: Design, Analysis and Software Integration.” Dr. Swartout has also served as a scholar at ResearchTalk’s Qualitative Research Summer Intensive and as a mentor at ResearchTalk’s Qualitative Data Analysis Camps.

### **Mark Vagle**

Mark D. Vagle is associate professor and associate department chair in the Department of Curriculum and Instruction at the University of Minnesota’s College of Education and Human Development. He conducts, and teaches doctoral seminars focusing on, phenomenological research. In addition, Vagle teaches courses on qualitative research methodologies, as well as philosophies, theories, and teaching practices that inform the schooling of elementary students. Currently, Vagle is using what he has termed post-intentional phenomenology to critically examine various ways in which issues related to social class take concrete (lived) shape in the curriculum and pedagogies of elementary education. He has published his work widely in journals such as the *International Journal of Qualitative Studies in Education*, *Qualitative Inquiry*, *Field Methods*, and *Curriculum Inquiry*--and his book, *Crafting Phenomenological Research* was published by Left Coast Press in 2014.