



UNC  
THE ODUM INSTITUTE

**15<sup>th</sup> Annual  
Qualitative Research Summer Intensive  
July 23 – 27, 2018  
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 23-24 (two-day courses)**

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

**Scholar Instructor:** Trena Paulus

**Dates:** Monday-Tuesday, July 23-24

From social media to online support groups to learning at a distance, conversations on the Internet have long been of interest to qualitative researchers in a variety of fields. Though a majority of research in this area relies on content analysis methods, this course will present a variety of qualitative methods for analyzing online conversations.

We will introduce a research framework for analyzing online conversations, an approach designed to assist researchers in creating conceptually congruent research designs to answer important questions about what is happening in online conversations. More specifically, the framework will help participants learn how to:

- Identify an object of interest for investigation
- Recognize philosophical and theoretical assumptions that impact research design
- Create focused and relevant research questions
- Ensure methodological alignment across aspects of the study design
- Resolve ethical dilemmas surrounding the analysis of online conversations
- Transform online conversations into a coherent dataset
- Select appropriate technologies for working with the data

- Analyze data using thematic, narrative and discursive techniques
- Establish the quality of the findings

Relevant course material will come from *Researching Learning, Insight and Transformation in Online Talk* (forthcoming in 2018, Routledge).

**Course:** *CBPR - Community-Based Participatory Research: Practical Tools and Structures*

**Scholar Instructors:** Geni Eng, Melvin Jackson, Alexandra Lightfoot and Jennifer Schaal

**Dates:** Monday-Tuesday, July 23-24

Whether new to or experienced with engaging communities in research, investigators are challenged by the inevitable tensions between scientific requirements for rigor and control, and communitarian demands for participation and transparency. Community-based participatory research (CBPR) is often complicated by multi-layered partnerships, based in power relations negotiated between diverse groups (each with specific histories, politics, and cultures), while being regulated by external forces of research governance. What is distinctive about CBPR is a set of principles to guide the openness, fluidity, and unpredictability of a collaborative approach to research.

Through conducting CBPR since 1991, our team of academic and community-based investigators has developed and used practical tools and structures for CBPR partners to:

- define a common vocabulary to discuss power and inequities
- codify equitable decision-making power
- anticipate and manage conflict
- approve and co-author findings and publications
- establish alternate institutional ethical review processes

In this course, we will use a blend of brief lectures, discussions, and interactive exercises to stimulate thinking creatively about CBPR tools and structures, and apply the results to our own work. For example, to analyze and guide our practice in applying CBPR principles, you will receive a “real life” case of a community-academic partnership engaged in using the qualitative research method of *critical incident technique interview* to explore if African American and White women, diagnosed and treated with breast cancer at the same facility, received cancer care that was the same. We are enthusiastic about the potential for co-learning.

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

**Scholar Instructor:** Johnny Saldaña

**Dates:** Monday-Tuesday, July 23-24

Being in conversation with qualitative data can include identifying ideas that spark meaning, insight, and sense-making. This two-day workshop focuses on a range of selected methods of coding qualitative data for analytic outcomes that includes patterns, categories, themes, processes, causation, and diagrams.

The workshop will address:

- Various coding methods for qualitative data (with an emphasis on interview transcripts)
- Analytic memo 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., 2016, Sage).

**Course:** *Designing and Executing Qualitative Data Collection Projects*

**Scholar Instructors:** Ray Maietta and Alison Hamilton

**Dates:** Monday-Tuesday, July 23-24

The main goal of this course is to position you to develop an active and engaged posture toward data collection. To accomplish this goal, we will emphasize strategies to employ a posture of openness, flexibility, and responsiveness in our data collection practices.

Course content will direct interaction with four qualitative data collection strategies:

1. Interviews
2. Focus Groups
3. Observation
4. Online data collection

Ten data engagement strategies, listed here, will direct our course content and provide you with a checklist and action plan for your fieldwork:

- *Understanding:* How well do you understand the topic of and audience for your project? Are you familiar with the properties, dimensions, and dynamics of your topic and how further work in your field will affect audiences for your work?
- *Aligning:* How do your data collection strategies and 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 your data collection format and approach? How do you foster a sense of ownership for participants in the data collection experience?
- *Opening:* What are ways to open the interaction and 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? What do you note from the field? How do you develop your observation skills?
- *Following:* How do you maintain a proper posture to discover, but not unduly influence, your participants' experiences? How do you manage the conversation and observation 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 data collection protocols and interview or focus group approaches? How can you shift your approach, language, and direction on the spot as you listen to and observe people's unfolding narratives?
- *Closing:* How can you naturally and affirmatively reach the conclusion of each data collection episode?
- *Processing:* How do you track and understand the evolution of your interview/focus group guide and data collection protocols to process the meanings these changes have for your project?

- *Contextualizing*: How do considerations of ethical, political, and social implications related to your study, your participants, and the communities in which your study is located guide and direct your practices and what you present?

Employing these strategies through the life of your project will ensure you ask the right questions to the right people at the right time and in the right way. This practice will also help you to understand how the conversations and interactions occurring during data collection fit what is currently known about, and practiced in, your field.

**Course:** *Mixed Methods Research: Foundations for Design, Execution and Dissemination*

**Scholar Instructor:** Cheryl Poth

**Dates:** Monday-Tuesday, July 23-24

Mixed methods research requires specialized knowledge yet also builds upon existing qualitative and quantitative research skills. The overall goal of this workshop is to engage in discussions of perceived (and real) challenges when designing, conducting, and disseminating mixed methods research.

To achieve this goal, we will consider three key questions:

1. What distinguishes quality mixed methods research designs from other types of research?
2. How can researchers avoid common pitfalls seen in mixed methods research designs and articles?
3. What recent advances in the field of mixed methods research can be incorporated into designs and manuscripts?

Knowledge of and experience with the issues raised in these questions will maximize the quality of your designs, feasibility of your procedures, and avenues for disseminating your completed mixed methods research.

Participants are encouraged to bring a study idea or preliminary draft of a proposal or paper that they can explore during the workshop. Workshop content is derived from Onwuegbuzie and Poth's (2016) Editors' afterword: "Toward Evidence-based Guidelines for Reviewing Mixed Methods Research Manuscripts Submitted to Journals" (available open access from *International Journal of Qualitative Methods*, 15:1-13).

**Course:** *Writing Effective Qualitative and Mixed-Methods Research Proposals*

**Scholar Instructor:** Margarete Sandelowski

**Dates:** Monday-Tuesday, July 23-24

The focus of this course is on concrete, this-is-how-you-might/should-say-it strategies for designing and writing effective and 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 also include an interactive session where participants will have the opportunity, as time permits, to ask questions about their own proposals for problem solving.

## JULY 25 (One-Day Courses)

**Course:** *Creating Quality in Qualitative Research*

**Scholar Instructor:** Sarah Tracy

**Dates:** Wednesday, July 25

In quantitative communities, measures of quality are relatively simple: validity, reliability, generalizability, and objectivity. However, qualitative research cannot and should not be evaluated by these same yardsticks. This workshop presents a parsimonious, “big tent” model of qualitative quality in which participants will explore eight key markers of quality in qualitative research including: 1) worthy topic, 2) rich rigor, 3) sincerity, 4) credibility, 5) resonance, 6) significant contribution, 7) ethics and 8) meaningful coherence.

This model is based upon material from *Qualitative Research Methods: Collecting Evidence, Crafting Analysis, Communicating Impact* (2013, Wiley-Blackwell) and this article: Tracy, S.J. (2010). “Qualitative Quality: Eight ‘Big-tent’ Criteria for Excellent Qualitative Research.” *Qualitative Inquiry*, 16:837-51.

The eight points of the big tent model will enable teachers, researchers, and practitioners of qualitative inquiry to:

1. Identify a **worthy topic** that is relevant, timely, significant and interesting to core audiences
2. Create **rich rigor** through using sufficient, abundant, appropriate, and complex theories, data, constructs, and analysis processes
3. Communicate **sincerity** by being self-reflexive and transparent
4. Ensure **credibility** through thick description, triangulation, crystallization, multivocality, and member reflections
5. Fashion **resonant research** that influences and moves audiences through aesthetic representation, naturalistic generalization, and transferable findings
6. Develop a **significant contribution**—theoretically, practically, morally, methodologically, and heuristically
7. Practice **qualitative ethics**—including procedural, situational, relational, and exiting considerations
8. Craft **meaningful coherence** by interconnecting literature, research questions, findings and interpretations so that they fit together, cohere with the study’s goals, and connect with the audience’s expectations.

The model also equips consumers and evaluators of qualitative work with measures to assess the quality of material they review.

The workshop is targeted to researchers, grant-writers, and instructors of qualitative methods—both those new to these areas as well as experienced inquirers.

**Course:** *Presenting Qualitative Results to Quantitative Audiences*

**Scholar Instructor:** Alison Hamilton

**Dates:** Wednesday, July 25

A key challenge with qualitative methods is conveying results to quantitative audiences in compelling, rigorous, and impactful ways. Qualitative research is often preconceived by quantitative audiences to be

less than rigorous, “too subjective,” and “anecdotal.” The course will equip students with tools and techniques for presenting qualitative results effectively and dynamically.

We will discuss:

#### Setting the Stage

- Describing the qualitative analytic approach that was used
- Fostering openness between the presenter and the audience
- Considering the needs of different audiences

#### Balancing Detail and Message

- Privileging the data while using quotes judiciously
- Juxtaposing data with your interpretations
- Situating theory strategically
- Using different types of data displays (diagrams, maps, tables, etc.) to convey results
- Using language that will resonate with non-qualitative audiences

#### Reinforcing Key Takeaways

- Addressing negative, skeptical, or critical responses to qualitative results
- Fostering trust in qualitative results

Taught by a mixed methods researcher who frequently presents to quantitative audiences, the course will be oriented toward capturing and expressing experience through varying strategies that move beyond a simple binary contrast of “qualitative” and “quantitative.”

**Course:** *Synthesizing Qualitative Data*

**Scholar Instructor:** Johnny Saldaña

**Date:** Wednesday, July 25

After qualitative data have been collected and initially analyzed, we are faced with the larger task of making meaning across numerous narratives and expanding ideas. This course provides strategies for this data synthesis—for moving into advanced data analysis and integrative theory building.

The workshop will address:

- Analytic heuristics (assertions, themes, propositions, concepts)
- Analytic write-ups (memos, vignettes)
- Data analytic display-making (matrices and diagrams)
- Theory development

We will make use of an analytic synthesis chart that outlines approaches for integrating meaningful ideas and making sense *of* data and *across* data. These methods are transferable to any discipline, including business, education, social sciences, and health care, etc.

Workshop content is derived from Saldaña’s methods texts including *The Coding Manual for Qualitative Researchers* (3rd ed., 2016, Sage), and the co-authored *Qualitative Data Analysis: A Methods Sourcebook* (3rd ed., 2014, Sage), and *Qualitative Research: Analyzing Life* (2018, Sage).

**Course:** *Using Qualitative Inquiry to Solve Social Problems*

**Scholar Instructor:** Kevin Swartout

**Dates:** Wednesday, July 25

Qualitative inquiry can help us understand the meaning of social problems, moving beyond simply identifying social determinants and correlations to revealing underlying mechanisms at work. By moving closer to the problem, we can access the insider accounts—stories that can be used to motivate change and save lives. Rich data and attention to the voices of survivors, stakeholders, and gatekeepers provide openings for devising constructive solutions. In this way, qualitative inquiry equips us with evidence, action steps, prevention strategies, targeted messaging, and informed interventions.

This course will include discussion of qualitative processes that will position participants to draw nuanced conclusions to aid social problem solving. The timely issue of sexual misconduct will be threaded through the course as an example to demonstrate decision-making across the methodological life of a qualitative project:

- Topic decision-making: What part(s) of the social problem can and should be studied?
- Choosing respondents: Who should the participants be? How will you gain access?
- Designing data collection strategies: For research on sensitive topics, how do you shape data collection guides? How do you obtain IRB approval? Which research methods and procedures are most ethical, efficient, and effective?
- Developing an analysis plan: How can you capture the holistic stories of participants' experiences?
- Disseminating results: How can you develop convincing arguments regarding policy and practice?
- Planning and implementing interventions: How can findings be used to inform interventions?

**Course:** *Using Social Media, Software, Mobile Apps and other Digital Tools to Support Qualitative Research*

**Scholar Instructor:** Trena Paulus

**Dates:** Wednesday, July 25

This one-day course introduces participants to how both free and proprietary technologies can be used to create innovative workflows to support the entire qualitative research process. This includes becoming networked scholars through a variety of social media platforms; engaging in a paperless literature review by using cloud storage, citation management software, annotating apps and data analysis software; collecting data with mobile apps; transcribing with state-of-the-art innovations; selecting the right qualitative data analysis software; and writing research reports through storyboarding. 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. Participants will get a sneak peek of *Doing Qualitative Research with Digital Tools*, forthcoming from Sage in 2019.

Topics and tools will include:

- Networking 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 8)
- Collecting data through mobile apps (ATLAS.ti, Evernote), social media sites (Twitter), and GeoDocs (Google Earth)
- Transcribing in ways that synchronize the media file with the text (Inqscribe and Youtube) and enable "hands-free" transcription (Dragon Dictate and Google Voice)
- Selecting an appropriate qualitative data analysis software package (e.g. DeDoose, ATLAS.ti, MAXQDA, NVivo, Quirkos)
- Managing the writing process 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:** *Writing Appealing Qualitative Research Reports*

**Scholar Instructor:** **Margarete Sandelowski**

**Dates:** **Wednesday, July 25**

The focus of this 1-day course is on practical strategies to produce research reports publishable in high-quality peer-reviewed journals. The course will cover an array of topics including:

- Communicating the significance and methodological details of a study
- Selecting the appropriate journal venue, empirical and theoretical framing, and style, logic, emphasis, and organizational structure for the report
- Effectively using such literary elements as vantage point and metaphor, and such devices such as casing, counting, quoting, tabulating, titling, and diagramming to show methodological and findings details
- Presenting research results accessible to and translatable by researchers or practitioners
- Strategically planning multiple reports from a common parent study, including mixed methods studies
- Wisely managing reject and revise-and-resubmit responses to submitted manuscripts
- Tricks of the trade for overcoming writing paralysis or blocks.

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).

## **JULY 26-27 (Two-Day Courses)**

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

**Scholar Instructor:** Johnny Saldaña

**Dates:** Thursday-Friday, July 26-27

The wealth of qualitative research methods and strategies for analysis can be overwhelming to beginners as well as those who have experience with qualitative data approaches. This two-day workshop will walk participants through basic approaches to and methods for qualitative inquiry. Primary topics addressed will include:

- A survey of qualitative data collection methods: interviewing, participant observation, documents/artifacts
- Qualitative research design
- A survey of qualitative data analytic methods
- Writing and presenting qualitative research

Multiple practical and on-your-feet activities will be included throughout the course to provide students with experiential knowledge, skill building, and methods literacy.

Newcomers to qualitative inquiry will benefit from this course by gaining workshop experience in the basic methods of qualitative research for future study and application. Experienced qualitative researchers will benefit from this course by refreshing their knowledge bases of methods, plus observing how introductory material is approached with novices for future applications in the classroom. Course content will be adapted from Saldaña's *Fundamentals of Qualitative Research* (2011, Oxford), and Saldaña and Omasta's textbook, *Qualitative Research: Analyzing Life* (2018, Sage).

**Course:** *Making Claims and Building Theory in Qualitative Inquiry*

**Scholar Instructor:** Sarah Tracy

**Dates:** Thursday-Friday, July 26-27

All too commonly, qualitative researchers face obstacles and unfair critiques by grant reviewers, committee members, or journal reviewers that their research is not yet theoretically or practically significant. This workshop introduces eight distinct heuristic tools that, when applied strategically, transform qualitative data into claims that evolve theory and practice in important and impactful ways:

- Jeopardy research questions
- Abduction
- Negative case analysis
- Conceptual cocktail parties
- Carrying claims
- and more

The following workshop exercises will enable participants to understand the heuristic tools and apply them in their own work:

- Engaging claim-making and theory building worksheets that lead to an iterative and phronetic (wise) analysis

- Practicing open coding, in vivo coding, creating a qualitative codebook, and differentiating between first- and second-level codes
- Crafting specific claims that resonate and transfer to a variety of settings
- Exploring and practicing iterative writing and a formula for being “interesting”
- Learning tips for crafting qualitative research that fully engages and connects with intended audiences

This course is designed for those new to qualitative methods as well as experienced researchers who want to deepen their analyses or refine their techniques for teaching qualitative interpretation and analysis.

Resources for this workshop will come, in part, from S. Tracy’s *Qualitative Research Methods: Collecting Evidence, Crafting Analysis, Communicating Impact* (2013, Wiley-Blackwell) and from Huffman and Tracy’s “Making Claims that Matter: Heuristics for Theoretical and Social Impact in Qualitative Research” (In press), *Qualitative Inquiry*.

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

**Scholar Instructor:** Alison Hamilton

**Dates:** Thursday-Friday, July 26-27

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 can the mixed methods study be designed to maximize the potential for synergy among the different types of data?
- Conceptual, theoretical, and/or logic models as roadmaps to set the stage for and guide integration
  - How can the model—and the language of the model—be developed to reflect interdisciplinary inputs?
- Analytic strategies that advance frameworks and dynamic 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

- How can tensions in mixed methods results be addressed creatively, to foster meaningful products?

**Course:** *Qualitative Analysis: Using the "Sort and Sift, Think and Shift" Toolkit*

**Scholar Instructors:** Ray Maietta and Kevin Swartout

**Dates:** Thursday-Friday, July 26-27

The Sort and Sift, Think and Shift qualitative data analysis approach, created by Ray Maietta and his consulting team at ResearchTalk Inc, 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 in order to bridge findings with current conversations in their field and to assess implications for practice. The method combines tenets and practices from phenomenology, grounded theory, case study and narrative research. The ResearchTalk team has utilized and taught this approach for over a decade to qualitative researchers across disciplines and industries.

- 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.

1. 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.
2. 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.

Each phase of the Sort and Sift method features a toolkit to facilitate analytic activities.

- The “Diving In” toolkit features tools to use as you read, review, recognize and record your observations during data review.
- The “Stepping Back” toolkit features tools to use as you reflect, re-strategize and re-orient after your “diving in” phases of analysis.

The iterative back and forth between these phases allows you to bridge emergent findings and concepts to conversations and practices currently engaged by your colleagues.

**Course:** *Qualitative Inquiry: Evaluating and Applying Five Approaches*

**Scholar Instructor:** Cheryl Poth

**Dates:** Thursday-Friday, July 26-27

Following the Creswell/Poth book *Qualitative Inquiry and Research Design: Choosing Among Five Approaches* (4th ed., 2017, Sage), this course examines the designs, rationales, and procedures inherent to five qualitative research approaches:

1. Narrative Research
2. Phenomenology
3. Grounded Theory

4. Ethnography
5. Case Study

These five approaches all emphasize rigorous strategies for qualitative inquiry. Independent books and articles have been written about each and qualitative scholars feature these approaches in their published work.

Five questions will enhance your ability to evaluate and apply each approach:

1. What are the defining features?
2. What are the typical data collection procedures and how are rigorous procedures assessed in published research?
3. What are the common data analysis strategies and how is evidence of validity established?
4. What ethical considerations need to be anticipated and how are arising issues presented?
5. What challenges are likely encountered and how are study limitations discussed?

Participants are encouraged to bring their ideas for a qualitative study to explore during the workshop as there will be embedded opportunities for small and large group discussions.

**Course:** *Qualitative Research for Applied Practice*

**Scholar Instructor:** Sally Thorne

**Dates:** Thursday-Friday, July 26-27

This course focuses on developing skills and confidence in designing and conducting a qualitative study for the purpose of translating knowledge into practice in an applied field. We will consider applied qualitative research in theory, in process, and in context. That is, we will work through the various phases of conceptualizing and conducting a qualitative study whose purpose extends beyond theorizing and seeks action-in-the-world.

The course will cover basic elements of the logic of philosophical, theoretical, and disciplinary positioning, sampling, data collection options, and interpretation in an applied qualitative research context. We will reflect on the relationship between these components of design and the qualities of a project that engender work that is trustworthy, credible, and appropriately aligned with the investigator's applied research aims. We will consider how we know what we know and how we make knowledge claims, particularly evidentiary claims, on the basis of qualitative investigation. We will delve into how applied qualitative researchers transform data pieces into patterns and thematic observations into meaningful findings, allowing participants an opportunity to wrestle with the intellectual mechanics that data analysis entails.

In addition to instruction, handouts, and a list of suggested references, the course will also include interactive components; participants will be invited to ask questions regarding their own inquiry to inform the collective thinking of the group.

Course content is adapted from Dr. Thorne's book, *Interpretive Description: Qualitative Research for Applied Practice* (2016, Routledge.)

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

### **CBPR Bios - Geni Eng, Melvin Jackson, Alexandra Lightfoot and Jennifer Schaal**

**Geni Eng**, MPH, DrPH, is Professor of Health Behavior at the Gillings School of Global Public Health, University of North Carolina at Chapel Hill. She has over 30 years of CBPR experience including field studies conducted with rural communities of the U.S. South, Sub-Saharan Africa and Southeast Asia to address socially stigmatizing health problems such as pesticide poisoning, cancer, and STI/HIV. Her CBPR projects include the NCI-funded Accountability for Cancer Care through Undoing Racism and Equity, the CDC-funded Men As Navigators for Health, the NCI-funded Cancer Care and Racial Equity Study, the NHLBI-funded CVD and the Black Church: Are We Our Brother's Keeper? In addition to her co-edited book, Methods for Community-Based Participatory Research for Health, she has over 115 publications on the lay health advisor intervention model, the concepts of community competence and natural helping, and community assessment procedures.

**Melvin Jackson**, MSPH, has over 35 years of experience in community engagement, public health research and program coordination. He is a principal partner with The PRIME Collective, LLC, a group of community experts who consults and partners with investigators in how to incorporate principles of community engagement into all phases of research. The PRIME Collective also provides an avenue for addressing many of the barriers faced around community members engaging in academic research. Melvin Jackson is the founding community co-director of the Graduate Certificate in Participatory Research. He also serves as Community Course Director for the Thorp Faculty Engaged Scholars Program at the University of North Carolina, which provides two years of training, networking and skill-development in engaged scholarship to interdisciplinary faculty. Melvin Jackson is a Consultant to Community-Campus Partnerships for Health through its work on the RWJF Clinical Scholars Program. He is also the Public Health Advocacy Coordinator/Local Improvement Advisor with the Alexander YMCA SCALE (Spreading Community Accelerators through Learning and Evaluation) with the Southeast Raleigh Promise Collaborative. The Collaborative is a part of the transformative redevelopment initiative, a community that will become a vibrant and vital link to elementary education, affordable housing, health and wellness, economic opportunity and leadership development in Southeast Raleigh.

**Alexandra Lightfoot**, EdD, is Research Assistant Professor in the Department of Health Behavior at the Gillings School of Global Public Health at the University of North Carolina at Chapel Hill. She also directs the Community Engagement, Partnerships and Technical Assistance (formerly CBPR) Core at UNC's Center for Health Promotion and Disease Prevention, a CDC-funded Prevention Research Center. In this capacity, she promotes the use of CBPR and provides trainings, workshops and technical assistance to investigators and community partners to strengthened partnered research approaches. She is co-investigator on multiple studies that use the CBPR approach to address health disparities and advance health equity, including research collaborations with workshop co-presenters Eng, Schaal, and Jackson. She is passionate about youth engagement and addressing racial inequities in health and education. Her current research focuses on the adaptation of adolescent sexual health interventions for new contexts. She has extensive experience using participatory arts-based approaches, including photovoice, to engage communities and inform intervention development and implementation.

**Jennifer Schaal**, M.D. completed her residency in Obstetrics and Gynecology at the University of Minnesota and practiced gynecology in a small private practice until she retired in 2006. While in practice she was a clinical investigator for the HERS (Heart and Estrogen-Progestin Replacement) and ERA (Estrogen Replacement and Atherosclerosis) studies and was on the Community Advisory Board of the Women's Health Initiative. Her committee work included service on the Moses Cone Hospital Institutional Review Board, Ob/Gyn Peer Review Committee, Pharmacy Committee and the Oncology Executive Committee. Dr. Schaal is a founding member of the Greensboro Health Disparities

Collaborative (GHDC), which was organized in 2002. She served as co-chair of the GHDC for two years and as secretary for 5 years. She is a member of the board of directors for The Partnership Project, the fiscal agent for the GHDC. As a medical-community member of the GHDC, she participated as an interviewer and Critical Incident Technique analyst for the GHDC's CCARES (Cancer Care and Racial Equity Study). She assisted in the planning, design, implementation and analysis of the "Respectful Prescribing" study, a pilot study for the Community Translational Science Award Grant Application by the UNC Center for Community and Clinical Research. She has been an active participant in the development and implementation of the GHDC's Health Equity Training. For the GHDC's recently completed NCI-funded Accountability for Cancer Care through Undoing Racism and Equity (ACCURE) study she was the community co-lead for analysis and interpretation of focus group data; participated in development and presentations of Healthcare Equity Education & Training; and training and supervising telephone interviewers for ACCURE. With Dr. Eng and other academic and community partners she has delivered keynotes for University of New Mexico, University of Michigan, and Asia Institute in Cambodia; co-presented scientific presentations at APHA in 2008, 2014, 2016, 2017; co-authored multiple peer-reviewed publications and book chapters; and served as Community Expert for CBPR Charrettes and co-trainer for multiple 2-day CBPR workshops. In addition, she has served on multiple research advisory boards and has been a community partner with other investigators on CBPR projects. She is active with the Guilford Anti-Racism Alliance and is currently a trainer for the Racial Equity Institute based in Greensboro, NC.

### **Alison Hamilton**

Alison B. Hamilton, Ph.D., M.P.H., a 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 Associate Director for Implementation Science 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*.

Dr. Hamilton has been a consultant with ResearchTalk for over 19 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 and Data Collection Camps. At recent Intensives, she has taught courses on qualitative methods in implementation research, 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).

### **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*, (Guilford Press) 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.

### **Trena Paulus**

Dr. Trena Paulus, Ph.D., is a Professor of Qualitative Research Methods at the University of Georgia. She is author of *Digital Tools for Qualitative Research* (2014, Sage) and *Researching Learning, Insight and Transformation in Online Talk* (2018, Routledge). Dr. Paulus has published over 50 peer-reviewed journal articles on topics related to qualitative research technologies, language-based methodologies for investigating online conversations, and online learning. She is co-founder of the Digital Tools special interest group at the International Congress of Qualitative Inquiry and recently co-edited a special issue on the topic for *Qualitative Inquiry*. Dr. Paulus consults and provides workshops on the use of digital tools, discourse analysis, and online discussions in a variety of research contexts in the U.S. and internationally. She is a certified professional trainer for ATLAS.ti.

### **Cheryl Poth**

Cheryl Poth is a faculty member and award winning instructor in the Centre for Research and Applied Measurement and Evaluation in the Department of Educational Psychology at the University of Alberta,

Edmonton, Alberta, Canada. In this role, she has developed and teaches graduate courses in research methods and program evaluation. Dr. Poth has an adjunct appointment in the Faculty of Medicine and Dentistry and serves as the methodologist on several cross-disciplinary research teams. Her specific research interests include enhancing research quality and collaborative research teams in the fields of education and the health sciences. She is an advisory board member of the International Institute of Qualitative Methodology and fourth president of the Mixed Methods International Research Association. She currently serves as associate editor of the *Journal of Mixed Methods Research* and editorial board member of the *International Journal of Qualitative Methodology* and *Canadian Journal of Program Evaluation*. She has recently co-authored with John Creswell on the 4th edition of *Qualitative Inquiry and Research Design* (2017, Sage) which was recently awarded Sage's Cornerstone Author award and is working on a Mixed Methods Research book with Sage publications (forthcoming in late 2018).

### **Johnny Saldaña**

Johnny Saldaña is Professor Emeritus from Arizona State University's (ASU) School of Film, Dance, and Theatre in the Herberger Institute for Design and the Arts. He is the author of *Longitudinal Qualitative Research: Analyzing Change through Time* (2003, AltaMira), *The Coding Manual for Qualitative Researchers* (3rd ed., 2016, Sage; translated into Korean, Turkish, and Chinese-Simplified), *Fundamentals of Qualitative Research* (2011, Oxford, 2011), *Ethnotheatre: Research from Page to Stage* (2011, Left Coast), *Thinking Qualitatively: Methods of Mind* (2015, Sage), co-author with the late Matthew B. Miles and A. Michael Huberman for *Qualitative Data Analysis: A Methods Sourcebook* (3rd ed., 2014, Sage), and the editor of *Ethnodrama: An Anthology of Reality Theatre* (2005, AltaMira). His most recent book is *Qualitative Research: Analyzing Life*, a new methods textbook with co-author Matt Omasta (2018, Sage). He is currently at work on a new commissioned title for Routledge's World Library of Educationalists Series: *Writing Qualitatively: The Selected Works of Johnny Saldaña*.

Saldaña's works have been cited and referenced in over 7,000 research studies conducted in over 130 countries, in disciplines such as K-12 and higher education, medicine and health care, technology and social media, business and economics, government and social services, the fine arts, the social sciences, human development, and communication. Saldaña's research in qualitative inquiry, data analysis, and performance ethnography has received awards from the American Alliance for Theatre & Education, the National Communication Association—Ethnography Division, the American Educational Research Association's Qualitative Research Special Interest Group, New York University's Program in Educational Theatre, and the ASU Herberger Institute for Design and the Arts. He has published a wide range of research articles in journals such as *Research in Drama Education*, *Multicultural Perspectives*, *Youth Theatre Journal*, *Journal of Curriculum and Pedagogy*, *Teaching Theatre*, *Research Studies in Music Education*, and *Qualitative Inquiry*, and has contributed several chapters to research methods handbooks.

### **Margarete Sandelowski**

Margarete Sandelowski is Boshamer Distinguished Professor Emeritus at the University of North Carolina at Chapel Hill School of Nursing. She has directed and was 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* (2007, Springer) and *With Child in Mind: Studies of the Personal Encounter with Infertility* (1993, University of Pennsylvania), 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 (2013, Routledge); "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 (2011, Sage); "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 (2010, Sage); "Writing the Proposal for a Qualitative Research Methodology Project," by M. Sandelowski in *Qualitative Research 2* (vol. 2), edited by A. Bryman (2007, Sage); "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 (2003, Sage).

Dr. Sandelowski has been awarded as principal investigator four 5-year R01 grants from the National Institutes of Health in the qualitative and mixed methods research domains. She has served on NIH and other grant review panels, and contributed to the NIH Office of Behavioral and Social Science Research Working Group that resulted in the 2011 *Best Practices for Mixed Methods Research in the Health Sciences*. She was inducted in 2015 into the Sigma Theta Tau International Nurse Researcher Hall of Fame.

### **Kevin Swartout**

Kevin Swartout is an Associate Professor in the Department of Psychology with a secondary appointment in the School Public Health at Georgia State University in Atlanta, GA. He earned his Ph.D. in Psychology from the University of North Carolina at Greensboro. His research focuses on social influence of harassment and violence, as well as trajectories of violent behavior and victimization across the lifespan. He has received early-career awards from the International Society for Research on Aggression, Southeastern Psychological Association, and Georgia State University. Dr. Swartout has published numerous peer-reviewed research articles and frequently speaks at national and international conferences. He has been a qualitative research consultant with ResearchTalk Inc. for ten years. In this capacity, he has regularly taught short courses on qualitative and mixed methods research as well as qualitative data analysis software. Dr. Swartout frequently serves as a scholar at ResearchTalk's Qualitative Research Summer Intensive and as a mentor at ResearchTalk's Qualitative Data Analysis Camps and he is also a co-author on Dr. Ray Maietta's Sort and Sift, Think and Shift forthcoming publication.

### **Sally Thorne**

Sally Thorne, RN, PhD, FAAN, FCAHS, DSc(Hon) is a Professor of Nursing and Associate Dean of the Faculty of Applied Science at the University of British Columbia, Canada where she has maintained a longstanding program of substantive research in the fields of chronic illness and cancer experience as well as scholarship in the fields of philosophy of science, including the epistemological basis of

disciplinary knowledge development in the health fields, and the nature of evidence claims in a complex health policy environment. She is the author of a body of applied qualitative methodological writing, including *Interpretive Description* (2008, Left Coast) and its second edition *Interpretive Description: Qualitative Research for Applied Practice* (2016, Routledge). She is an Associate Editor for the multidisciplinary journal *Qualitative Health Research* (Sage) and Editor-in-Chief for a journal that deals with critical scholarship in nursing and health care *Nursing Inquiry* (Wiley). A longstanding member of the Advisory Board for the International Institute of Qualitative Methodology, Thorne also serves on several other editorial boards and she consults and speaks on matters relating to qualitative methods nationally and internationally.

Link to Professor Thorne's profile page, with research interests, publications and other information in the tabs:

<http://www.nursing.ubc.ca/faculty/biopage.aspx?c=51.2249938994628>

### **Sarah Tracy**

Dr. Sarah J. Tracy is Herberger Professor of organizational communication and qualitative methodology in the Hugh Downs School of Human Communication at Arizona State University. She has led over 20 qualitative workshops in a number of international settings in which participants go beyond learning about methods to practicing specific qualitative crafts and analytic techniques. Sarah created the "eight big-tent criteria" model for excellent qualitative research and is author of *Qualitative Research Methods: Collecting Evidence, Crafting Analysis, Communicating Impact* (2013, Wiley-Blackwell), a YouTube channel called "*Get Your Qual On*," and more than 65 monographs. She approaches research from a use-inspired standpoint and endeavors toward creating scholarship that inspires wisdom, compassion, transformation, and well-being.

Publications, an occasional blog, YouTube channel, and more information:

<http://www.sarahjtracy.com/>

<https://humancommunication.clas.asu.edu/sarah-tracy>

<https://www.youtube.com/channel/UCs650R3zTPitGjT2GuqUGuw/videos>