



Odum Institute  
for Research in  
Social Science

**24<sup>th</sup> Annual**  
**Qualitative Research Summer Intensive**  
**July 26 - 30 and August 2-6, 2027**  
***Courses offered exclusively in online format***

Hosted by:  
ResearchTalk, Inc.  
in partnership with  
UNC's Odum Institute for Research in Social Science

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

### **JULY 26-27 (two-day courses)**

**Course:** *Introduction to Grounded Theory: A Constructivist Approach*

**Scholar Instructor:** Elaine Keane

**Dates:** Monday-Tuesday, July 26-27

Grounded theory is recognized as one of the most popular and highly cited methodologies in qualitative research, yet a perusal of many papers citing its use demonstrates a lack of understanding of its core features. This course aims to make explicit and clarify for participants the core features of a grounded theory research design, and the adaptations necessary to align the methodology with constructivist principles that emphasise the key role of the researcher in the co-construction of theory and the related need for critical reflexivity.

This two-day workshop introduces participants to key topics including:

- The history and development of grounded theory
- Critical reflexivity and researcher positionalities
- Coding stages and categorizing
- Memoing and diagramming
- Theoretical sampling
- Involving participants in the research process
- Constructing, conceptualizing and writing grounded theory, throughout and at the end of a study
- Evaluating a constructivist grounded theory (CGT)

The course includes multiple practical exercises to actively engage participants in developing and refining their knowledge and skills. Data for use in these activities will be provided, but participants may also bring their own data if they prefer. The course commences with the fundamentals and then engages more deeply with implementing grounded theory's core processes and considers the application of constructivist adaptations. Throughout the course, there is an emphasis on CGT's epistemological

foundation and resultant adaptations to the research process, including the literature review, researcher positionality/ies and reflexivity, and participant involvement. Other topics include using some of the powerful grounded theory strategies (such as open coding) in studies with a different overall methodological approach.

Course content will draw on the extensive scholarship of Kathy Charmaz, Barney Glaser, and Anselm Strauss, as well as readings and resources from grounded theory scholars Robert Thornberg, Adele Clarke, and myself, including the following:

- Charmaz, K. (2014) *Constructing grounded theory*. 2nd edition. London: Sage
- Charmaz, K., Thornberg, R., and Keane, E. (2018) Evolving grounded theory and social justice inquiry. In N. K. Denzin, and Y. S. Lincoln (Eds.), *The SAGE handbook of qualitative research* (5th ed.). Thousand Oaks, CA: Sage. pp. 411–443
- Keane, E. (2015) Considering the practical implementation of constructivist grounded theory in a study of widening participation in Irish higher education, *International Journal of Social Research Methodology*, 18(4), pp. 415-431
- Keane, E. (2022) 'The Legacy of Kathy Charmaz's scholarship and mentorship: Enacting her constructivist principles through critically reflexive grounded theory practice', in Bryant, A. and Clarke, A. E. (Eds) Festschrift in Honor of Kathy Charmaz'. *Studies in Symbolic Interaction*, 56, pp. 133-148.
- Keane, E. (2022) Analytic memoing. In C. Vanover, P. Mihas, and J. Saldaña (Eds.), *The Analysis and Interpretation of Qualitative Data: After the interview*. Thousand Oaks, CA: Sage, pp. 259-274
- Keane, E. (2023) 'The use of literature in a grounded theory study' In Birks, M. and Mills, J. (Eds): *Grounded Theory: A Practical Guide (3rd. ed.)*. London: Sage, pp. 94-95
- Keane, E. and Thornberg, R. (2023) 'Grounded Theory: History, Genres, and Implementation' In Lester, J., Salvo, J. and Ulmer, J. (Eds): *Routledge Encyclopaedia of Qualitative Research Methods*. London: Routledge.
- Keane, E. and Thornberg, R. (Eds.) (2025) *The Routledge International Handbook of Constructivist Grounded Theory in Educational Research*, London: Routledge
- Morse, J. M., Bowers, B. J., Charmaz, K., Clarke, A. E., Corbin, J., Porr, C. J., & Stern, P. N. (2021) *Developing grounded theory: The second generation revisited*. Routledge.
- Thornberg, R. (2012) Informed grounded theory. *Scandinavian Journal of Educational Research*, 56, pp. 243–259.
- Thornberg, R., and Keane, E. (2022) Designing grounded theory studies. In U. Flick (Ed.), *Sage handbook of qualitative research design*. London: Sage, pp. 452-466
- Thornberg, R., Keane, E. and Wójcik, M. (2023) 'Grounded theory and psychological research', in Cooper, H., Coutanche, M. N., McMullen, L. M., Panter, A. T., Rindskopf, D. and Sher, K. J., eds., *APA handbook of research methods in psychology: Research designs – Quantitative, qualitative, neuropsychological, and biological*, 2nd ed., Washington, DC: American Psychological Association, 45–63.

**Course:** ***Qualitative Methods in Rapid Turn-Around Projects: Strategic Decision-Making for Rigor and Feasibility***

**Scholar Instructor:** **Alison Hamilton**

**Dates:** **Monday-Tuesday, July 26-27**

Using qualitative methods in rapid turn-around projects depends on strategic decision-making to make rapid data collection and analysis feasible without compromising rigor and depth of inquiry. In many fields, demand for this type of qualitative research is growing, as are techniques and strategies for conducting this type of research. This work is typically characterized by targeted research questions, strategic methods, and defined deliverables due to constituents within a short timeframe. In this vein,

we need to build skills for being responsive to what is happening in the field—emphasizing methodological flexibility and remaining attentive to opportunities for emergent discovery.

We begin this course by addressing the design and execution of qualitative methods in rapid turn-around projects. The following topics will be addressed using various examples:

- determining when, why, and how to apply conceptual or theoretical frameworks in rapid turn-around projects;
- conducting team-based data collection and analysis in rapid projects;
- identifying themes in rapid analysis;
- moving from rapid analysis to other analytic tools (e.g., diagrams, codes);
- fostering and maintaining rigor; and
- synthesizing and presenting rapid analysis results in different types of deliverables (e.g., reports, summaries, presentations, manuscripts).

We will then focus on building additional analytic skills to move beyond early stages of reviewing and condensing data to more emergent and integrative techniques for discerning conceptual bridges and connective threads across data. We will also discuss limitations of rapid analysis.

This course will provide participants with resources for building the foundational qualitative knowledge necessary for this work as well as strategies and tools for increasing methodological flexibility and managing the rigor of data collection and analysis. The course will draw on material from:

- Hamilton, A., Finley, E. (2019). Qualitative methods in implementation research: an introduction. *Psychiatry Research*, Oct; 280:112516. <https://doi.org/10.1016/j.psychres.2019.112516>
- Kowalski, C.P., Nevedal, A.L., Finley, E.P., Young, J.P., Lewinski, A.A., Midboe, A.M. and Hamilton, A.B., 2024. Planning for and Assessing Rigor in Rapid Qualitative Analysis (PARRQA): a consensus-based framework for designing, conducting, and reporting. *Implementation Science*, 19(1), pp.1-14. <https://doi.org/10.1186/s13012-024-01397-1>.
- Maietta, Raymond C., Reifsteck, Erin J., Petruzzelli, Jeff, Mihas, Paul, Swartout, Kevin, & Hamilton, Alison B. "The Sort and Sift, Think and Shift Analysis Method" (chapter 16), in Richards, K. A., Hemphill, M. A., & Wright, P. M. (Eds.). (2024). *Qualitative research and evaluation in physical education and sport pedagogy*. Jones & Bartlett Learning.
- Maietta, R., Mihas, P., Swartout, K., Petruzzelli, J., & Hamilton, A. B. (2021). Sort and Sift, Think and Shift: Let the Data Be Your Guide, An Applied Approach to Working With, Learning From, and Privileging Qualitative Data. *Qualitative Report*, 26(6), 2045-2060. <https://doi.org/10.46743/2160-3715/2021.5013>
- St. George, S. M., Harkness, A. R., Rodriguez-Diaz, C. E., Weinstein, E. R., Pavia, V., & Hamilton, A. B. (2023). Applying rapid qualitative analysis for health equity: lessons learned using "EARS" with Latino communities. *International Journal of Qualitative Methods*, 22, 16094069231164938. <https://doi.org/10.1177/16094069231164938>

**Course:** *Qualitative Research Essentials: Understanding the Landscape, Lifecycle, and Value of Qualitative Inquiry*

**Scholar Instructor:** Sarah Tracy

**Dates:** Monday-Tuesday, July 26-27

Are you a qualitative newbie or found yourself thrown into a qualitative project and wondered if you were "doing it right"? Maybe you were asked to step in halfway through with little context, or felt like your teacher or supervisor assumed you already knew how to proceed. Or perhaps you're teaching qualitative research yourself and would value practical tools and examples to share.

This workshop offers a clear and supportive introduction to qualitative research—the kind that demystifies the process and helps you gain confidence, whether you’re brand new, simply need a refresher, or want new ideas for teaching qualitative research. Across two days, we’ll walk through the full lifecycle of a qualitative project, from framing a question to collecting data to making sense of findings. You’ll get hands-on practice with activities like mock interviews and fieldnote writing, while also exploring behind-the-scenes lessons from real projects on leadership, workplace bullying, and compassionate communication.

**In this workshop, you will learn to:**

- Recognize the unique value of qualitative research compared to quantitative approaches.
- Craft effective research questions, choose sampling strategies, and match data types to research goals.
- Practice participant observation and fieldnote writing.
- Design interview and focus group questions, then role-play mock interviews.
- Be introduced to creative and artistic qualitative approaches such as photovoice.
- Learn how to organize and prepare qualitative data for analysis, with a basic orientation to analytic strategies.
- Understand what “quality” means in qualitative research, using Sarah Tracy’s widely recognized *Eight Big-Tent Criteria for Excellent Qualitative Research*—one of the most cited frameworks in the field.
- Anticipate common challenges and learn strategies to address them.
- Gather practical teaching tips and case examples to bring into the classroom.

We’ll do all this in a space of light-heartedness, dialogue, and mutual support. Participants leave with a qualitative mindset, a clearer sense of the terrain, and greater confidence to design, teach, or jump into a qualitative project—even if it’s brand new to you.

Resources for this workshop draw from *Qualitative Research Methods: Collecting Evidence, Crafting Analysis, Communicating Impact* (3rd ed., Wiley, 2025) and from Sarah’s experience publishing more than 100 scholarly reports and presenting qualitative research over 350 times to scholarly, professional, and pedagogical audiences.

**Course:** *Writing Lives and Telling Stories: Composing Autoethnographic and Narrative Accounts of Lived Experience*

**Scholar Instructors:** Carolyn Ellis and Arthur Bochner

**Dates:** Monday-Tuesday, July 26-27

This workshop will be of interest to both novice and advanced students, researchers, and practitioners seeking to integrate autoethnographic storytelling and narrative into their research, teaching, and everyday life. The course will offer researchers effective ways to explore the personal, relational, and contextual dimensions of their work, with relevance across disciplines, including applied fields in health, medicine, and education.

We will guide workshop attendees in the following areas:

- the history of autoethnography and narrative as approaches to doing research
- becoming storywriters and living the writing life
- fundamental ethical issues, dilemmas, and responsibilities in qualitative research
- the intersection of ethnography with autoethnography
- how remembering transforms meanings by moving them from past to present

- publishing autoethnographic and narrative research

In working through several prose and multi-media exemplars, workshop attendees will gain experience in:

- writing vulnerably about crucial turning points they and their research participants have lived through
- envisioning writing about life's messiness
- practicing thinking with stories
- imagining how to do research creatively and collaboratively
- considering doing research that is relevant to real people leading actual lives
- pondering the moral and ethical concerns of their work

Workshop attendees will have an opportunity to do narrative and personal writing and to discuss how these practices might fit into their ongoing qualitative research projects.

## JULY 28 (One-Day Courses)

**Course:** *Community-Centered Dissemination: Making Qualitative Work Accessible, Culturally Responsive, and Meaningful*

**Scholar Instructor:** Kristin Black

**Date:** Wednesday, July 28

Too often, qualitative research ends when the manuscript is submitted, and the people whose stories shaped the findings never see what came of them. This one-day online workshop reframes dissemination as an ethical and necessary part of the research process rather than an afterthought. We will look at how returning findings to communities can strengthen rigor, build trust, and make research more useful to the people it is about.

A central feature of the course is a guided tour of dissemination products from real projects. Participants will see a wide range of formats, from community briefs, data walks, infographics, and policy summaries to arts-based approaches that merge research with photography, dance, poetry, and theater. Through these examples, we will discuss what makes a product accessible, culturally responsive, and meaningful to its intended audience, and what trade-offs come with different formats, including time, cost, confidentiality, and who gets to tell the story.

We will also work through common challenges, such as disagreement between community and researcher interpretations, protecting confidentiality in small communities, and sharing findings on limited budgets and timelines.

Participants will leave with a broader sense of what is possible, guidance for choosing approaches that fit their work, and practical questions to guide their own dissemination planning.

**Course:** *Qualitative Survey Data: Tapping into the Full Potential of Open-Ended Responses*

**Scholar Instructor:** Cheryl Poth

**Date:** Wednesday, July 28

Open-ended survey questions offer a valuable window into participants' experiences, perspectives, and reasoning—insights that extend far beyond numerical patterns. Yet too often, these responses are overlooked, underanalyzed, or dismissed as anecdotal evidence rather than as a potentially rich source of qualitative data.

This one-day course helps researchers, evaluators, and practitioners tap into the full potential of open-ended survey responses. Participants will learn how to design these survey questions thoughtfully and analyze them systematically, with a particular focus on the stories they can tell and the possibilities of integrating qualitative insights meaningfully alongside quantitative survey findings.

We will consider five key questions:

1. Why do open-ended survey questions matter?
2. How can researchers make strategic sampling and integration decisions about open-ended data?
3. How can open-ended questions be designed effectively?
4. How can researchers introduce strategies to analyze open-ended questions both within individual participants' full response set and across all participant open-ended responses?
5. What are common challenges encountered when designing, collecting, analyzing, and reporting integrated survey insights—and how can they be overcome?

**Course:** *Writing Effective Qualitative Research Proposals*  
**Scholar Instructor:** Sharron Docherty  
**Date:** Wednesday, July 28

This 1-day course presents pragmatic, concrete strategies for designing and writing effective and competitive qualitative research proposals. We cover principles generic to proposal design, and specific ways to communicate the aims, significance, conceptual framing, methodological details (sampling, data collection, analysis plans, and plans for optimizing validity and human subjects protections), and budget justification for the proposed study. We also cover strategies for addressing aspects of qualitative designs that are likely to draw concern among reviewers less familiar with them, most notably the purposeful sampling frame and the generalizability of study findings. We highlight distinctions between proposals written for governmental, foundation, and private industry grant review audiences and show methods for locating potential private-sector funding mechanisms.

In addition to didactic instruction, handouts and a suggested reference list, participants will have the opportunity, as time permits, to ask questions about their own proposals.

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

## JULY 29-30 (Two-Day Courses)

**Course:** *AI as Thought Tool to Navigate the Complexities of Qualitative Inquiry*

**Scholar Instructor:** Mark Vagle

**Dates:** Thursday-Friday, July 29-30

This course explores the intersection of AI and qualitative inquiry, specifically through Vagle's conception of analytic "thought tools"—where analytic strategies and processes are seen as provoking, extending, and producing insights and ideas. Rather than treating AI merely as an analytical engine for data reduction, this course re-imagines AI as an active, provocative thought tool that can help researchers navigate the complexities of studying lived experience.

Participants will examine how AI can be integrated into their qualitative research process—from the initial formulation of research questions to the iterative, non-linear analysis of data. Participants will critically assess the ethical, ontological (what it is to be), and epistemological (what it is to know) implications of using AI to explore phenomena.

This course is designed for qualitative researchers looking to push the boundaries of their methodological practice. Through a blend of theoretical seminar discussion and application, students will learn to use AI tools to engage with, rather than resolve, the tensions inherent in their work. By the end of the course, participants will develop a clearer understanding of this ethically reflexive approach to using AI as a partner in their ongoing analytic processes.

**Course:** *Enriching Implementation Research with Deeper Forms of Qualitative Inquiry*

**Scholar Instructor:** Alison Hamilton

**Dates:** Thursday-Friday, July 29-30

This course will equip implementation scientists to go beyond "what works" and uncover why and how change actually happens. To get to these unpredictable phenomena characteristic of implementation, we need a qualitative toolkit that goes beyond semi-structured interviews designed according to a pre-existing framework. Tools like periodic reflections, observation, and other ethnographically rich methods can expand our ability to illuminate subtle forces driving implementation phenomena. These tools help us see how interventions and strategies evolve in context—bringing clarity to adaptations, shifting conditions, relational dynamics, and outcomes.

By getting creative and flexible with our qualitative methods in implementation research, we can open up opportunities for discovery. Drawing on examples from implementation research in health care, education, communities, and policy, we will:

- explore different strategies for selecting and aligning qualitative methods with project goals, study design, and resources;
- consider how to integrate theories/models/frameworks in more flexible and nuanced ways throughout data collection, analysis, and interpretation; and
- examine different ways of generating results and different types of actionable products for diverse audiences (e.g., policy-makers, implementation practitioners).

Participants will be provided with materials and bibliographies to support the use of qualitative methods in implementation research. The course draws on material from these resources:

- The National Cancer Institute white paper on which Dr. Hamilton is an author:  
<https://cancercontrol.cancer.gov/sites/default/files/2020-09/nci-dccps-implementation-science-whitepaper.pdf>
- Hamilton, A., Finley, E. (2019). Qualitative methods in implementation research: an introduction. *Psychiatry Research*, Oct; 280:112516.  
<https://doi.org/10.1016/j.psychres.2019.112516>
- Hamilton, A.B., Fix, G.M., Finley, E.P. (2024). *Pragmatic healthcare ethnography: Methods to study and improve healthcare*. Routledge.

**Course:** ***Qualitative Data Generation: Conducting Interviews, Focus Groups, and Field Observations***

**Scholar Instructor:** Elaine Keane

**Dates:** Thursday-Friday, July 29-30

Data generation is at the heart of high-quality, impactful qualitative research. Without a solid empirical basis of sufficiently rich data, producing a high-quality study is challenging. This two-day course will discuss rationales for choosing one or several data generation methods (individual interviews, focus groups, and field observations) that best align with project research questions. We will talk through developing data generation schedules (what to do when), addressing participant recruitment concerns, developing appropriately open questions, strategies for follow-up probing, and building rapport with participants for both ethical and data quality reasons. The course will also address considerations regarding generating data with individuals from vulnerable, disadvantaged, and marginalized groups.

More specific topics will include the following:

- Initial considerations for high-quality data generation, such as participant recruitment
- Addressing sample size: “How many participants do I need?”
- Sequencing of data generation
- Conducting and reviewing pilot interviews
- “Requirements” of established methodologies
- The role of researcher positionalities and ethical issues
- Addressing the focus group “effect” and skills for facilitating a focus group
- “Being an ethnographer”: Level of engagement in the field necessary for generating effective observations
- Considering what is to be “observed” and writing valuable field notes
- Preparing for analysis during data generation

The course will include multiple practical exercises to engage participants in developing and refining their knowledge and skills. Course content will draw from several resources, including the following:

- Caillaud, S., Nikos, K., & Doumergue, M. (2022) Designing focus groups, in Flick, U. (Ed.) *The Sage Handbook of Qualitative Research Design*, London: SAGE, pp. 684-699.
- Cohen, Manion and Morrison (2017) *Research Methods in Education*, 8th ed., Routledge.
- Charmaz, K. (2014) *Constructing grounded theory*, 2nd ed., London: SAGE. (see: Chapter 2, Gathering rich data, pp. 22-54; Chapter 3, Crafting and conducting intensive interviews, pp. 55-82; Chapter 4, Interviewing in grounded theory studies, pp. 83-108).
- Coffey, A. (2018) *Doing ethnography*, London: SAGE.
- deMarrais, K., Roulston, K., & Copple, J. (2024) *Qualitative Research Design and Methods: An Introduction*, Maine: Myers Education Press.
- Denzin, N. K. (1996) *Interpretive ethnography: Ethnographic practices for the 21st century*, New York: SAGE.

- Flick, U. (2018) Doing qualitative data collection—charting the routes, in Flick, U. (ed.) *The SAGE handbook of qualitative data collection*, London: SAGE, pp. 1-16.
- Hammersley, M., & Atkinson, P. (2019) *Ethnography: Principles in practice*, London: Routledge.
- Krueger, R. A., & Casey, M. A. (2015) *Focus groups: A practical guide for applied research* (5th ed.). Thousand Oaks, CA: SAGE.
- Roulston, K. (2010) *Reflective interviewing: A guide to theory and practice*, London: SAGE.

**Course:** ***Writing for Impact: Strategies to Successfully Craft and Publish Qualitative Research***

**Scholar Instructor:** **Sarah Tracy**

**Dates:** **Thursday-Friday, July 29-30**

Writing is central to qualitative inquiry at every stage of the research process—not just something that happens “at the end.” Yet, many researchers find themselves struggling alone, unsure how to make their writing persuasive, significant, or powerful.

This two-day supportive workshop offers a mix of lecture, discussion, and hands-on writing exercises designed to strengthen your craft and build confidence. Participants will practice proven strategies for crafting qualitative reports that connect with key audiences, advance theory, and resonate beyond the page. Activities will emphasize writing efficiently, creatively, and coherently — interweaving evidence, imagery, metaphor, and argument.

Whether you are working on an analytic report, dissertation, book, or journal article, this workshop provides practical tools as well as a caring, collaborative environment. It is also useful for those grappling with revisions or responding to reviews. Participants can bring along a current writing project, or learn from the examples provided.

**In this workshop, you will learn to:**

- Frame your research to capture your audience’s attention.
- Identify the most receptive publication outlets—including alternative representations beyond the journal article.
- Recognize the distinct features of qualitative writing and the pros/cons of different approaches.
- Understand the key “puzzle pieces” of a qualitative report—abstract, rationale, literature/conceptual framework, methods, findings, and implications.
- Practice claim-making, theorizing, and explanation through writing heuristics.
- Experiment with artistic and visual approaches (e.g., drawings, photos, word clouds, qualitative models).
- Spot common pitfalls in qualitative writing and learn strategies to avoid them.
- Navigate the publication process, including how to respond to reviewer critiques.
- Consider the ethical use of AI in qualitative writing.

Resources for this workshop draw from *Qualitative Research Methods: Collecting Evidence, Crafting Analysis, Communicating Impact* (3rd ed., Wiley, 2025) and from Sarah’s experience publishing more than 100 scholarly reports and presenting qualitative research over 350 times to scholarly, professional, and pedagogical audiences.

## **AUGUST 2-3 (two-day course)**

**Course:** *Integrating AI into Qualitative Research Appropriately*

**Scholar Instructor:** Christina Silver

**Dates:** Monday-Tuesday, August 2-3

The capabilities of AI-assisted tools raise significant questions for qualitative research. This course provides a thorough understanding of the landscape of Artificial Intelligence (AI) in qualitative research, covering the principles, practices, and ethics of using these technologies throughout the analytic workflow.

The course introduces a range of tools designed to facilitate qualitative research that harness AI in different ways. Participants will have the opportunity to experiment with a selection of tools, using sample data and their own research materials, if appropriate.

The emphasis of the course is to critically reflect on the potential role and appropriate use of AI-driven tools in qualitative research, and a framework for doing so is shared. This includes the recently emerging Generative-AI tools, and more traditional AI tools that have been available for longer. Ethical issues are central, along with how to document the use of AI transparently, and best practices for integrating AI with human interpretation in qualitative studies. We also discuss the future of qualitative research in the Generative-AI world, reflecting on the impact on methods of these technologies.

Participants will leave the course with a clear understanding of the implications of employing AI in qualitative studies and with practical experience of several tools. The qualitative AI space is evolving quickly, so the tools focused on during this course are subject to change, depending on what is available at the time of the course, but will include tools from across the qualitative-AI space. Participants will have free access to all the tools used for the purpose of the course, and will be provided access ahead of the first sessions. If it is not possible for you to access these tools on your computers, you'll be able to watch a demonstration on-screen.

## AUGUST 4-5 (two-day courses)

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

**Scholar Instructors:** Paul Mihas and Karen Campbell

**Dates:** Wednesday-Thursdays, August 4-5

Coding serves as a heuristic—that is, a method of discovery—for paying analytic attention to qualitative data through a range of possible lenses. It provides a foundation for analytic sense-making, including developing and refining categories, themes, and theories—while also fostering analytic precision, emergent discovery, and insight into participants’ lifeworlds.

Rather than treating codes as static containers, this course emphasizes coding as a generative practice and codes as fluid, evolving tools for iterative meaning-making. We will discuss foundational principles for coding, how different coding practices—such as process coding, versus coding, and in vivo coding—can be used in concert, rather than as isolated techniques and consider how coding serves as a heuristic bridge to visual displays and reflective analytic memos. Finally, we will address how generative artificial intelligence (GenAI), when human-led, can serve as an additional tool for qualitative data analysis. The course will provide opportunities for in-class exercises and activities.

Course content is informed by Saldaña’s *The Coding Manual for Qualitative Researchers* (5th edition, 2025; SAGE Publishing).

**Course:** *Netnography: Qualitative Digital Inquiry for the Age of AI*

**Scholar Instructor:** Robert Kozinets

**Dates:** Wednesday-Thursdays, August 4-5

Netnography is a qualitative research methodology for developing cultural understanding through digitally mediated traces, experiences, interactions, practices, networks, and systems. The cultural phenomenon itself does not have to be digital. Netnography can be used to investigate health and illness, parenting, religion, education, work, consumption, grief, politics, family life, ecological relations, and virtually any other cultural phenomenon to which digital mediation provides consequential access. In some studies, technology provides a pathway into the phenomenon; in others, platforms, algorithms, and artificial intelligence are themselves part of what must be understood and explained.

This intensive two-day course presents the latest formulation of netnography developed in Robert V. Kozinets’s new and fully updated textbook, *Netnography: Qualitative Digital Inquiry for the Age of AI*. It offers a structured but flexible approach to designing, conducting, interpreting, and communicating qualitative digital research. Unlike content analysis, social listening, and large-scale scraping, netnography does not simply extract or classify digital material. It uses sustained cultural engagement, immersion, reflexivity, contextual interpretation, ethical responsibility, and appropriate evidence to produce warranted cultural understanding.

The course is organized around netnography’s three tenets—Engagement, Ethics, and Evolvment—and its seven recursive movements: Initiation, Immersion, Investigation, Interaction, Integration, Interpretation, and Incarnation. Together, they provide a methodological grammar for designing an inquiry, documenting and justifying methodological decisions, responding to unexpected developments, and communicating findings responsibly. Across the two days, participants will learn how to formulate culturally oriented research questions, identify and enter a contextual field, establish an ethical stance, develop an immersion practice, and work with investigative, immersive, and interactive forms of evidence. Artificial intelligence will be considered throughout as a cultural phenomenon, a component

of the contextual field, and a research technology whose uses and limitations require continuing human judgment and ethical responsibility.

Over the course of the two days, we will cover topics that include:

- 1. Netnography Fundamentals**
  - What Netnography Is—and Is Not
  - The Range of Cultural Phenomena Netnography Can Investigate
  - Netnography and Other Approaches to Digital Research
  - The Three Tenets of Netnography
  - The Seven Movements and the Netnographic Spiral
- 2. Initiating and Ethically Designing a Netnographic Project**
  - Formulating Culturally Oriented Research Questions
  - Identifying the Contextual Field and Engagement Sites
  - Assessing Access, Scope, Relevance, and Feasibility
  - Ethical Wayfinding, Privacy, and Research Responsibility
- 3. Immersion, Investigation, and Interaction**
  - Immersion and the Researcher-as-Instrument
  - Developing and Using an Immersion Journal
  - Investigating Digital Traces and Constructing a Corpus
  - Interacting with Research Participants
  - Conducting Individual and Collaborative Netnography
- 4. Integrating and Interpreting Cultural Evidence**
  - Bringing Immersive, Investigative, and Interactive Evidence into Relation
  - Recognizing Patterns, Differences, Contradictions, and Absences
  - Moving from Patterns to Cultural Interpretation
  - Developing Warranted Cultural Understanding
  - Evidentiary Sufficiency and Cultural Fidelity
- 5. Artificial Intelligence Across the Netnographic Inquiry**
  - AI as a Cultural Phenomenon
  - AI as a Component of the Contextual Field
  - AI as a Research Technology
  - Opportunities, Risks, Documentation, and Human Responsibility
- 6. Incarnation, Presentation, and Impact**
  - Methodological Transparency and Evidentiary Warrant
  - Writing and Representing Netnographic Research
  - Incorporating Audiovisual and Multimedia Materials
  - Presenting Netnographic Research
  - Publishing Netnographic Findings

The course will provide participants with an up-to-date understanding of netnography and a practical framework for applying it to their own research. Through focused instruction, examples, exercises, and discussion, participants will learn how to design a culturally engaged and ethically responsible netnographic inquiry, develop appropriate forms of evidence, and communicate their methods and findings with clarity. Particular attention will be given to the opportunities and risks introduced by artificial intelligence while maintaining the indispensable role of human immersion, reflexivity, interpretation, and ethical judgment.

The course draws principally on material from:

- Kozinets, R. V. (2027). *Netnography: Qualitative digital inquiry for the age of AI* (4th ed.). SAGE.
- It also draws selectively on:
- Kozinets, R. V., & Gretzel, U. (2024). Qualitative social media methods: Netnography in the age of technocultures. In N. K. Denzin, Y. S. Lincoln, M. D. Giardina, & G. S. Cannella (Eds.), *The SAGE handbook of qualitative research* (6th ed., pp. 403–420). SAGE.
- Kozinets, R. V., & Gambetti, R. (Eds.). (2021). *Netnography unlimited: Understanding technoculture using qualitative social media research*. Routledge.

**Course:** *Qualitative Storying: Engaging Participants' Stories to Shape Our Work*

**Scholar Instructors:** Ray Maietta and Kristin Black

**Date:** Wednesday-Thursday, August 4-5

Life unfolds in stories, so should our qualitative data. Regardless of topic, our participants are engaged in actions and behaviors (*what*) with characters (*who*) across meaningful locations (*where*) and specific periods of time (*when*). Each experience carries its own rhythm, cadence, mood, and emotion. If our goal as qualitative researchers is to inform lasting change, our responsibility is to capture the complex, unpredictable dynamics that characterize the everyday lives of the people generous enough to invite us into their worlds.

In this course, we work together to turn the word "story" into an active verb through every phase of qualitative inquiry. Storying serves as our compass as we let participant experiences and words direct our work in the field, our analytic movement and our dissemination of findings.

Storying fundamentally alters how we conceptualize and conduct qualitative inquiry. Core orienting questions organize the course outline and introduce strategies that use authentic lived experience to guide project decision-making:

- *Project Onset:* What stories motivate our inquiry? How do we use these stories to direct our decisions and actions through each project phase?
- *Design:* Where do informative stories live and how can this information be used to design data collection, analysis and presentation strategies that honor the everyday experiences of our participants?
- *Data Gathering:* How do we create data collection encounters that participants want to, and are able to, engage with? How do we ensure we get enough of the story?
- *Data Analysis:* How do we shape analysis plans and actions that are guided by participant stories? How do we preserve the complete, authentic story within every case, rather than sorting data into abstract, decontextualized piles?
- *Presentation:* How can we use story themes to drive the presentation while honoring the authenticity of participant experience?
- *Future Directions:* How can the lessons we learn from participant stories be used to shape and implement programs and policies that enhance everyday life?

## AUGUST 6 (one-day courses)

**Course:** *Conducting Research with People, Not on or for Them: Centering Agency in Qualitative Interviews and Focus Groups*

**Scholar Instructor:** Stephanie Anne Shelton

**Date:** Friday, August 6

Qualitative inquiry can create opportunities for people whose experiences and perspectives are often marginalized, overlooked, or misrepresented, directly shaping how their lives and experiences are understood. Yet simply inviting marginalized participants into a study does not ensure a research process that centers their agency, attends to power dynamics, or creates opportunities for them to contribute their experiences on their own terms. The ways researchers frame research processes can reproduce and/or disrupt power dynamics and (unintentional) research-based harms.

This workshop focuses on practical skills and ethical considerations for designing and implementing qualitative research methods that center research participants' perspectives and needs. We consider how who researchers are and their methodological choices shape what becomes possible within qualitative encounters. Rather than treating participants as sources of data or researchers as neutral facilitators, the workshop explores how research design and interaction might create greater opportunities for participants to contribute their experiences, perspectives, and priorities on their own terms. Together we examine how seemingly routine choices—such as how research questions are framed, which questions are asked, how follow-up questions are posed, how silence or disagreement is handled, and whose contributions are taken up—can shape participants' agency and the knowledge produced through qualitative inquiry.

Because of their common usage, we concentrate on interviews and focus groups as our primary datatype examples. The workshop combines brief didactic sessions with hands-on activities, examples, discussions, and practical research methods exercises.

Three interconnected areas direct workshop content:

- **Recognizing power and positionality:** Examining how researcher subjectivities, assumptions, identities, and methodological choices shape qualitative research interactions.
  - **Designing interviews and focus groups that center participant agency:** Developing and revising research questions, interview guides, and focus group protocols to intentionally create meaningful opportunities for participants to contribute, redirect, elaborate, and respond on their own terms.
  - **Practicing and reflecting on qualitative encounters:** Developing strategies for open-ended interviewing and focus-group facilitation, including responding to unexpected answers, silence, disagreement, disclosures, and differences in participation, while attending to cultural, accessibility, ethical, and relational considerations.
- This workshop segment emphasizes the research encounter itself: how researchers listen, use follow-up questions, respond to unexpected directions, make space for silence and disagreement, and facilitate participation.

To close, we reflect on these interactions and consider how these experiences can lead participants to incorporate points learned into their research designs or facilitation strategies.

Throughout the workshop, we are guided by the central question:

**What does it mean to conduct qualitative research *with* people rather than *on* or *for* them?**

**Course:** *Reflexive Thematic Analysis: Identifying, Analyzing, and Interpreting Patterns of Meaning*

**Scholar Instructor:** Karen Campbell

**Date:** Friday, August 6

This course is designed to develop skills and confidence in conducting reflexive thematic analysis, a method for identifying, analyzing, and interpreting patterns of meaning within qualitative data. As its name implies, this approach to analytic theme building emphasizes the importance of reflexivity, encouraging researchers to critically engage with their own role and influence in the research process.

We will explore the theoretical foundations, practical processes, and contextual applications of reflexive thematic analysis, guiding participants through each phase of the research process as informed by Braun and Clarke. More specifically, we will cover the transformation of data into meaningful patterns and themes, providing course participants with the opportunity to engage with the intellectual and practical mechanics of thematic data analysis. Through this process, participants will learn strategies to make informed and credible knowledge claims. Finally, we will discuss techniques to enhance the trustworthiness and credibility of findings.

This course is informed by the following article:

- Campbell, K. A., Orr, E., Durepos, P., Nguyen, L., Li, L., Whitmore, C., Gehrke, P., Graham, L., & Jack, S.M. (2021). Reflexive Thematic Analysis for Applied Qualitative Health Research. *The Qualitative Report*, 26(6), 2011-2028. <https://doi.org/10.46743/2160-3715/2021.5010>

**Course:** *Strategies for Integrating Multiple Qualitative Methods to Build and Enhance Your Projects*

**Scholar Instructor:** Tony Adams

**Date:** Friday, August 6

Using more than one qualitative method within one project offers researchers multiple opportunities to attend to the lived experience of their participants. This strategy generates more textured, holistic stories from the field and contributes to more nuanced written work.

In this course Tony Adams introduces a broad methodological toolkit, highlighting four methods that can be used in isolation or combination.

Methods include:

- Textual analysis of historical documents, life texts, online posts and comments
- Informal conversations and formal interviews
- Ethnography, fieldwork, and participant observation
- Autoethnography and the use of personal experience

Two guiding questions direct the course conversation:

- Why use multiple methods?
- How to keep integration in mind throughout the project lifecycle?
  - *At design:* What can/does each method contribute?
  - *At sampling:* Are the same people/settings represented across methods? What are the advantages and disadvantages of this?
  - *During data collection:* Can/will findings from one source shape what you look for in another?
  - *During analysis:* How to decide if data should be analyzed separately, together, or iteratively?

- *During interpretation:* Where and how do findings converge, complement, complicate/diverge, or expand possible conversations that can result from a project?

Dr. Adams draws from projects in which he made innovative use of more than one qualitative method. Specifically, he will discuss the use of several methods across four interrelated publications about weight gain, sexuality, and becoming larger, and in his book, *Narrating the Closet: An Autoethnography of Same-Sex Attraction*.

The course draws on material from:

- Adams, Tony E. 2011. *Narrating the Closet: An Autoethnography of Same-Sex Attraction*. Routledge.
- Adams, Tony E., & Berry, Keith. 2013. Size Matters: Performing (Il)logical Bodies on FatClub.com. *Text and Performance Quarterly*, 33, 308-325. <https://doi.org/10.1080/10462937.2013.818704>
- Adams, Tony E., 2024. Craving Bigger Bodies: Size, Sexuality, and Becoming Larger. In S. Whetstone & J. Hogan (eds.), *Consuming Bodies: Body Commodification and Embodiment in Late Capitalist Societies* (pp. 106-123). Routledge.
- Adams, Tony E. Forthcoming. Queer Media as “Equipment for Living”: Pleasures, Proclivities, and the Passing of Time. In H. W. Holladay and T. R. Dunn (Eds.), *Critical Autoethnographies of Popular Culture: Engaging the Cultural Stories that Shape Us*. Bloomsbury Academic.
- Boylorn, Robin M. and Adams Tony E. 2016. Queer and Quare Autoethnography. In N. K. Denzin & M. D. Giardina (eds.), *Qualitative Inquiry Through a Critical Lens* (pp. 85-98). Routledge.

## **Scholar Instructor Bios (Organized Alphabetically by Last Name)**

### **Tony Adams**

**Dr. Tony E. Adams** is a Caterpillar Professor of Communication and Acting Associate Dean of the College of Communications and Fine Arts at Bradley University. From 2014-2017, he served as the Chair of the Department of Communication, Media, and Theatre at Northeastern Illinois University. From 2017-2026, he served as Chair of the Department of Communication at Bradley University. He has published 100+ articles and book chapters, six books, and five edited collections. He is a founding co-editor of the *Journal of Autoethnography* (University of California Press) and Executive Director of the International Association of Autoethnography and Narrative Inquiry.

### **Kristin Black**

**Kristin Z. Black**, PhD, MPH, is an Assistant Professor in the Department of Maternal and Child Health at the University of North Carolina at Chapel Hill (UNC) in the Gillings School of Global Public Health. She received her MPH and PhD in Maternal and Child Health from UNC Gillings. Dr. Black is committed to utilizing community-based participatory research, mixed methods, and racial equity approaches to understand and address inequities in reproductive health and chronic disease outcomes. Her research merges 3 key components. First, Dr. Black explores the connections between reproductive health, maternal health, and chronic diseases, and if these outcomes differ by race/ethnicity or other social identities. Second, she focuses on understanding what individual- and systems-level factors may hinder or facilitate birthing people's journey through maternal healthcare services. Third, she is committed to transforming research into action by engaging community collaborators in implementing and sustaining interventions that tackle health inequities and structural racism.

Dr. Black is a part of the Robert Wood Johnson Foundation's first cohort of Health Equity Scholars for Action, a career development award that funded her project, *Mapping and Analyzing Pressure Points and Structural inequities in Maternal Healthcare (MAPPs-MH) Project*. She partners with investigators around the country and has been a co-investigator on funded grants at the Ohio State University, Washington University in St. Louis, and East Carolina University. Additionally, she is a Qualitative Research Consultant for ResearchTalk and Deputy Director of the UNC Center of Excellence in Maternal & Child Health Education, Science, and Practice. Through her research and teaching, Dr. Black mentors students at the undergraduate and graduate levels. She teaches courses on qualitative and quantitative research methods.

Dr. Black's work has been published in *Qualitative Health Research*, *Social Science & Medicine*, *Frontiers in Public Health*, *Ethnicity & Health*, *JAMA Oncology*, *Breast Cancer Research*, and *Progress in Community Health Partnerships: Research, Education, and Action*. Her array of published work includes leading a chapter about using anti-racism organizing in cancer care in the pivotal and timely book, *Racism: Science & Tools for the Public Health Professional*, published in 2019.

Dr. Black is dedicated to serving the public health profession and community organizations in the pursuit of health equity. She is a member of the Greensboro Health Disparities Collaborative (a community-medical-academic partnership) and former president of the Society for the Analysis of African American Public Health Issues.

She lives in Durham, North Carolina with her 8-year-old daughter.

### **Arthur Bochner**

**Arthur P. Bochner** is Distinguished University Professor Emeritus of Communication at the University of South Florida and a Distinguished Scholar of the National Communication Association. He is the author of two award-winning Books, *Coming to Narrative: A Personal History of Paradigm Change in the Human Sciences* (Left Coast Press, 2014) and *Evocative Autoethnography: Writing Lives and Telling Stories* (Routledge, 2016) with Carolyn Ellis. He has contributed chapters to numerous research handbooks and published more than 100 articles and book chapters. He is currently working with his partner, Carolyn Ellis, on a new book project, *Living an Autoethnographic Life*.

### **Karen Campbell**

**Karen Campbell, RN, PhD**, is an Assistant Professor in the School of Nursing at York University in Toronto, Ontario. Her program of research focuses on the intersections of women's health with physical and social geography, with the aim to improve health and quality of life for women experiencing health inequities across diverse settings, including rural communities and women with episodic disabilities. She conducts health research using applied qualitative designs, which have practical applications for practice, education, and policy, and is a co-editor and qualitative lead of *LoBiondo-Wood & Haber's Nursing Research in Canada Methods, Critical Appraisal, and Utilization 6<sup>th</sup> edition*. Dr. Campbell has conducted numerous workshops and courses on qualitative research methods and has published many practical papers that guide researchers in employing rigorous qualitative methods.

### **Sharron Docherty**

**Sharron L. Docherty, Ph.D., PNP**, is Professor and Vice Dean for Research Innovation and Executive Director of the Ruby L. Wilson Center for Nursing Science and Innovation. She is also a Professor in the Department of Pediatrics in the School of Medicine at Duke University. Her research examines how serious chronic illness and associated life-sustaining treatments affect the short- and long-term functioning of children, adolescents, and young adults, as well as their families, and the development, testing, and translation of interventions to address these impacts. She has methodological expertise in qualitative and mixed-methods, trajectory science and visualization methods for complex data exploration.

Dr. Docherty has a strong history of external research funding. She has served on numerous federal grant review panels, including NIH NINR-NRRC (training grants and career development awards), NCI, NIMHHD, and special review panels for RFAs/PAs/FOAs, as well as foundation and private review panels. She recently chaired the review panel for Strategies to Improve Health Outcomes and Advance Health Equity in Rural Populations (RFA-NR-24-005). She has taught graduate-level courses in qualitative and mixed methods.

### **Carolyn Ellis**

**Carolyn Ellis** is Distinguished University Professor Emerita of Communication and Sociology at the University of South Florida and a Distinguished Scholar of the National Communication Association. Her work has advanced the study of autoethnography through the integration of ethnographic, literary, and evocative writing to portray and make sense of lived experience in cultural context. She is coeditor of the *Handbook of Autoethnography* (with Tony Adams and Stacy Holman Jones), coauthor of *Evocative Autoethnography* and the Routledge Book Series, *Writing Lives: Ethnographic Narratives* (both with Art Bochner). Recently she has written about joy and hope in autoethnographic inquiry and is currently working with Art on a new book project, *Living an Autoethnographic Life*. She lives in Safety Harbor, Florida and Franklin, North Carolina with Art and their canine companions, Malee and Dali.

### **Alison Hamilton**

**Alison B. Hamilton**, Ph.D., M.P.H., a VA Senior Research Career Scientist and Professor-in-Residence 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 Implementation Research Director at the VA Health Systems Research Center for the Study of Healthcare Innovation, Implementation and Policy at the VA Greater Los Angeles Healthcare System, specializing in women Veterans' health, mental health services research, and implementation science. She directs 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. At UCLA she directs the Semel Institute Implementation Science and Practice Hub and the NIAID-funded UCLA Rapid, Rigorous, Relevant Implementation Science Hub. She is also an Honorary Professor in the Department of Psychiatry and Mental Health at the University of Cape Town, South Africa. She was a fellow in the inaugural cohort of the NIMH/VA Implementation Research Institute and she serves as an Associate Editor for *Implementation Science Communications* and on the editorial boards of *Implementation Science* (BMC), *Women's Health Issues* (Elsevier), and *Implementation Research and Practice* (Sage).

Dr. Hamilton has been a consultant with ResearchTalk for over 25 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 Methods Camps. At recent Intensives, she has taught courses on qualitative methods in implementation research, rapid qualitative research methods, qualitative grant-writing, qualitative interviewing, integrated mixed methods research, and enhancing the usefulness of qualitative research. Dr. Hamilton is a co-author on two articles that provide an overview of the *Sort and Sift* approach: "Sort and Sift, Think and Shift: Let the Data Be Your Guide: An Applied Approach to Working with, Learning from, and Privileging Qualitative Data" – 2021 (<https://nsuworks.nova.edu/tqr/vol26/iss6/20/>), and "The Sort and Sift, Think and Shift Analysis Method" in Richards, K. A., Hemphill, M. A., & Wright, P. M. (Eds.) (2024) *Qualitative research and evaluation in physical education and sport pedagogy*, Jones & Bartlett Learning. She is also a co-author on Dr. Ray Maietta's *Sort and Sift, Think and Shift* book (forthcoming, Guilford). She recently published *Pragmatic Healthcare Ethnography* (Routledge, 2024) with Drs. Gemmae Fix and Erin Finley.

## **Elaine Keane**

**Professor Elaine Keane**, PhD, is Professor and Head of the Discipline of Education in the School of Education at the University of Galway, Ireland. Her research focuses on social class and education, teacher diversity, and constructivist grounded theory (CGT), and she has published widely and has led national and international projects in these areas. She was lead editor of *Diversifying the Teaching Profession: Dimensions, Dilemmas and Directions for the Future* (Routledge, 2023), is Co-Editor of *Irish Educational Studies*, serves on the Editorial Board of *Teaching in Higher Education*, is Inaugural Chair of the *National Initial Teacher Education Diversity Network* and Convenor of the *Educational Studies Association of Ireland (ESAI) Special Interest Group on Teacher Diversity Research*.

On CGT, Elaine has collaborated and published with Professors Kathy Charmaz and Robert Thornberg and taught workshops throughout Ireland, the UK, Poland, Sweden, South Africa, and the USA, *inter alia* with the *Odum Institute for Research in Social Science* at the University of North Carolina and *ResearchTalk Inc*. She has taught CGT at the *International Congress of Qualitative Inquiry (ICQI)* at the University of Illinois at Urbana-Champaign, USA, since 2015 and was keynote speaker at the World Conference on Qualitative Research (WCQR) at Jagiellonian University, Kraków, Poland, in February 2025.

A member of the *International Association of Grounded Theorists*, Elaine is lead editor of the *Routledge International Handbook of Constructivist Grounded Theory in Educational Research* (2025) (Co-editor, Robert Thornberg). She has authored/co-authored chapters in many methodology texts, including the *APA Handbook of Research Methods in Psychology* (2023), *The Sage Handbook of Qualitative Research Design* (2022), and *The Sage Handbook of Qualitative Research* (5th ed., 2018). Since 2025, she is (EU) Editor of the *International Journal of Qualitative Methods* (SAGE). <https://orcid.org/0000-0002-1002-5119>

### **Robert Kozinets**

**Robert V. Kozinets** is the Jayne and Hans Hufschmid Chair of Strategic Public Relations and Business Communication at USC Annenberg and the USC Marshall School of Business. Over thirty years ago, he developed netnography, the qualitative research methodology now widely used to study digital culture, communities, platforms, and technologically mediated social life. He is the founder and president of the Association for Netnographic Research and an internationally recognized scholar of consumer culture, fandom, social media, influencer and creator culture, digital activism, and the cultural consequences of technology. His books include *Netnography: The Essential Guide to Qualitative Social Media Research*, *Netnography Unlimited*, *Consumer Tribes*, *Fandom as Co-Creation*, and *Influencers and Creators: Business, Culture and Practice*. His fourth edition of the netnography text, *Netnography: Qualitative Digital Inquiry for the Age of AI*, updates and extends the methodology for contemporary research environments. He is also co-authoring the 15-book *Frames of Fandom* series with Henry Jenkins. Kozinets received the EM Normandie Lifetime Research Award in 2022 and was named a Fellow of the Association for Consumer Research in 2024.

### **Ray Maietta**

**Ray 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. Ray has co-authored two recent articles with the ResearchTalk consulting team that provide an overview of the *Sort and Sift* approach: "Sort and Sift, Think and Shift: Let the Data Be Your Guide: An Applied Approach to Working with, Learning from, and Privileging Qualitative Data" – 2021 (<https://nsuworks.nova.edu/tqr/vol26/iss6/20/>) and "The Sort and Sift, Think and Shift Analysis Method" in Richards, K. A., Hemphill, M. A., & Wright, P. M. (Eds.) (2024) *Qualitative research and evaluation in physical education and sport pedagogy*, Jones & Bartlett Learning. More than 30 years of consultation with qualitative researchers informs Dr. Maietta's publications.

### **Paul Mihas**

**Paul Mihas** is the Assistant Director of Qualitative and Mixed Methods Research at the Odum Institute for Research in Social Science at the University of North Carolina at Chapel Hill and a senior qualitative analysis consultant at ResearchTalk Inc. Since 2013, he has taught for the Global School in Empirical Research Methods (GSERM), including five-day courses at the University of St. Gallen, Switzerland and the University of Ljubljana, Slovenia. He has also served as faculty at the ICPSR Summer Program in Quantitative Methods of Social Research (2015-2019, 2026). He has taught courses on coding and analytic memo writing at the annual Qualitative Research Summer Intensive, presented jointly by ResearchTalk and the Odum Institute, and has served as a mentor at ResearchTalk's annual Qualitative Data Analysis Camp. He is a co-author, with the ResearchTalk team, of articles on the methodology of Sort and Sift, Think and Shift. Recent publications include a chapter on qualitative data analysis in the

*Oxford Encyclopedia of Qualitative Research Methods in Education* (2019), as well as chapters on qualitative data analysis (2019; forthcoming 2027) and research design (forthcoming 2027) in *Research Design and Methods: An Applied Guide for the Scholar-Practitioner*. Recent publications include chapters on qualitative data analysis in the *Oxford Encyclopedia of Qualitative Research Methods in Education* (2019) and *Research Design and Methods: An Applied Guide for the Scholar-Practitioner* (2019). Other publications include methods chapters in the *International Encyclopedia of Education* (4th ed. 2023) and *Expanding Approaches to Thematic Analysis: Creative Engagements with Qualitative Data* (2022). He has contributed 10 methods articles to the online SAGE Research Methods Datasets (2019) on topics ranging from phenomenology to developing a codebook. He is the former managing editor of *Social Forces*, a journal of sociology now published at the University of Oxford Press.

### **Cheryl Poth**

**Cheryl Poth**, PhD is a Professor and award-winning instructor and author in the Centre for Research and Applied Measurement and Evaluation in the Faculty of Education at the University of Alberta in Canada. She is co-founder and lead of the Alberta Community and Clinical Evaluation and Research Team, teaches and supervises students within the measurement, evaluation, and data science program, 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. For over ten years as a scholar at ResearchTalk, she has taught short courses on qualitative and mixed methods research.

As an active member of the global mixed methods research community, she served as fourth president of the Mixed Methods International Research Association and has delivered invited talks and workshops on four continents. Her current editorial roles include serving as associate editor of the *Journal of Mixed Methods Research* (Sage) and as an editorial board member of the *International Journal of Qualitative Methodology* (Sage), *Methods in Psychology* (Elsevier), and *Canadian Journal of Program Evaluation* (Canadian Evaluation Society). She co-authored the 4<sup>th</sup> (2017, Sage) and 5<sup>th</sup> (2024, Sage) editions of *Qualitative Inquiry & Research Design* with John Creswell. She served as editor of the *The SAGE Handbook of Mixed Methods Research Design* (2023, Sage). Her books *Innovation in Mixed Methods Research: Guiding Practices for Integrative Thinking with Complexity* (2018, Sage) and *Research Ethics* (2021, Sage) are inspired by the dilemmas she hears in the field by learners.

### **Stephanie Anne Shelton**

**Stephanie Anne Shelton** is the Donald G. Tarbet Faculty Scholar in Education and Associate Professor of Qualitative Research Methodology in the School of Education at The University of North Carolina at Chapel Hill. In addition to eight books, Dr. Shelton has over 80 peer-reviewed articles, in outlets including *Qualitative Inquiry*, *International Journal of Qualitative Studies in Education*, *Qualitative Research Journal*, and *International Review of Qualitative Research*. She is the 2020 recipient of the American Educational Research Association (AERA) Division D Early Career Award in Measurement and Research Methodology, 2022 Nellie Rose McCrory Teaching Excellence Award, 2022 American Library Association's Choice Book Award, and 2025 AERA Division D Outstanding Contributions to Research Methods Award. Her scholarship has been funded by the Spencer Foundation, AERA, National Council of Teachers of English, and the U.S. Department of Justice Bureau of Justice Assistance.

### **Christina Silver**

**Christina Silver, Ph.D. SFHEA, FAcSS** is Director of the [CAQDAS Networking Project](#) (Faculty of Social Sciences (Sociology) at the University of Surrey, UK) which since 1994 has provided information, advice and training in a range of software packages designed to facilitate the analysis of qualitative data. She is also co-founder of [Qualitative Data Analysis Services \(QDAS\)](#), providing customised analytic consultancy

services for individuals and groups. Christina's interests are in the relationship between technology and methodology (including AI) and the teaching of computer-assisted analysis, and she has published many articles, blogs and textbooks on these topics. She has experience in using a range of digital tools to enact methods in different project types, across academic disciplines, and in applied, government and commercial contexts. Recent work has included enabling researchers to navigate the terrain of Qualitative-AI by encouraging balanced and critical perspectives about its potential role across the qualitative research workflow. This includes discussion of when the use of AI is not appropriate, and when it might be. Christina is widely seen as a leading voice on balanced and critical engagement with the rise of Generative-AI and its impact on qualitative research.

Selected publications include:

- Silver C. (2026). The Five-Level QDA Method in the Gen-AI Era: Rethinking Qualitative Pedagogy and Practice. In Friese S & Morgan D (eds.) *Qualitative Data Analysis with Artificial Intelligence: Theory, Methods and Practice*. Sage Publications.
- Silver C. (2026). Using digital tools to implement qualitative content analysis. In Schreier, M & Weydmann N. (eds.) *Handbook of Qualitative Content Analysis*. Edward Elgar Publishing Ltd.
- Silver C, Bulloch S & Salmona M. (2023). Digital Tools for Creative Data Analysis: Opportunities, Challenges and Future Directions. In Kara H (ed.) *The Bloomsbury Handbook of Creative Research Methods*. Bloomsbury Academic.
- Silver C, Bulloch S & Salmona M. (2023). Integrating the online teaching of qualitative analysis methods and technologies: challenges, solutions and opportunities. In Nind M (ed.) *Handbook of Teaching and Learning Social Research Methods*. Edward Elgar Publishing.
- Silver C. (2021). Tools for teaching computer assisted qualitative data analysis. MethodSpace article. Sage Publications. <https://researchmethodscommunity.sagepub.com/blog/tools-for-teaching-computer-assisted-qualitative-data-analysis>
- Silver C & Woolf N. (2021). Ensuring Analytic Strategies Drive the Use of Chosen QDAS program: The Five-Level QDA method. In Paulus T & Lester J *Doing Qualitative Research in a Digital World*. Sage Publications.
- Silver C & Lewins A. (2020). Computer-Assisted Analysis of Qualitative Research, in Leavy, P (ed.). *The Oxford Handbook of Qualitative Research*. Oxford University Press.
- Silver C, Bulloch SL, Salmona M. (2020.) Critical reflections on the 'new normal': Synchronous teaching of CAQDAS-packages online during COVID-19. Editors Notebook. Int. Journal of Social Research Methodology. <https://internationaljournalofsocialresearchmethodology.wordpress.com/2020/12/01/critical-reflections-on-the-new-normal-synchronous-teaching-of-caqdas-packages-online-during-covid-19/>
- Silver C & Woolf N. (2019.) Case Study: Using the Five-Level QDA Method with Dedoose in Salmona, M., Lieber, E. and Kaczynski, D., *Qualitative and Mixed Methods Data Analysis Using Dedoose: A Practical Approach for Research Across the Social Sciences*. Sage Publications.
- Silver C & Woolf N. (2019.) The Five-Level QDA Method. Foundation entry. In *Sage Methods Foundations*. Sage Publications.
- Paulus, T. M., Pope, E. M., Woolf, N., & Silver, C. (2018). "It will be very helpful once I understand ATLAS.ti": Teaching ATLAS.ti using the Five-Level QDA method. *International Journal of Social Research Methodology*, 22(1), 1–18. <https://doi.org/10.1080/13645579.2018.1510662>
- Silver C. (2018). CAQDAS at a Crossroads: Choices, Controversies and Challenges. In: Costa A., Reis L., Souza F., Moreira A. (eds) *Computer Supported Qualitative Research*. ISQR 2017. Advances in Intelligent Systems and Computing, vol 621. Springer. 10.1007/978-3-319-61121-1\_1.

## Sarah Tracy

**Dr. Sarah J. Tracy** (Ph.D., University of Colorado, 2000) is a Professor of qualitative methodology and organizational communication in The Hugh Downs School of Human Communication at Arizona State University, in Tempe, AZ, United States. She has led over 100 keynotes and workshops around the world for students, professors, and professionals in multiple disciplines related to her research. Sarah created the “Eight big-tent criteria” model for excellent qualitative research, developed phonetic iterative qualitative data analysis (PIQDA), and is author of *Qualitative Research Methods: Collecting Evidence, Crafting Analysis, Communicating Impact* (now in its 3<sup>rd</sup> edition with Wiley) and more than 100 scholarly monographs. She has been honored as Distinguished Scholar by The National Communication Association, Fellow by the International Communication Association, Distinguished Scholar and Distinguished Teacher by The Western States Communication Association, and is listed by Stanford University’s Scientist Career Rankings in the top 2% of scientists in the world. Sarah aims to provide people with relatable and actionable tips that they can use to immediately improve the quality, efficiency, impact, and enjoyment of their research. She approaches research from a use-inspired standpoint and endeavors toward creating scholarship that inspires wisdom, compassion, transformation, and well-being. In her free-time, Sarah enjoys playing with her rescue pup and cat, yoga, and traveling with her husband.

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

- <http://www.sarahjtracy.com/>
- <https://search.asu.edu/profile/283948>
- <https://www.youtube.com/channel/UCs650R3zTPitGjT2GuqUGuw/videos>
- <https://www.linkedin.com/in/sarahjtracy/>
- <https://www.facebook.com/profile.php?id=61589969650897>

Dr. Tracy has been a ResearchTalk/Odum scholar for more than 10 years, covering topics that span all stages of a qualitative project.

## Mark Vagle

**Mark D. Vagle** is Professor of Curriculum and Instruction at the University of Minnesota. He has written extensively on phenomenological and qualitative research in journals such as *Qualitative Inquiry*, *The International Journal of Qualitative Studies in Education*, *The Journal of Curriculum Studies*, *Cultural Studies—Critical Methodologies*, *Field Methods*, and *Teaching Education*; published articles about phenomena he has studied in journals such as, the *International Review of Qualitative Research*, *Journal of Adolescent and Adult Literacy*, and *Pedagogies: An International Journal*; and regularly teaches university courses, leads professional workshops, and is invited to lecture nationally and internationally regarding phenomenology and qualitative research. Building off the success of his award-winning first edition, his second (2018) and third (2025) editions of *Crafting Phenomenological Research* (cited over 3100 times, Google Scholar) continue to be the leading resource for those interested in a concise introduction to phenomenological research in the social sciences. Vagle is currently working on his next book, *Post-Intentional Phenomenology (PIP): A Guidebook*.