Research Talk Inc.

UNC | ODUM INSTITUTE FOR RESEARCH IN SOCIAL SCIENCE

> **23rd Annual**
> **Qualitative Research Summer Intensive**
> **July 27 - 31 and August 5-7, 2026**
> ***Courses offered exclusively in online format***
>
> **Hosted by:**
> **ResearchTalk, Inc.**
> **in partnership with**
> **the Odum Institute at UNC**

Course Descriptions (Organized by Date)

JULY 27-28 (two-day courses)

Course: ***Integrating AI into Qualitative Research Appropriately***
Scholar Instructor: **Christina Silver**
Dates: **Monday-Tuesday, July 27-28**

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. 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.

Course: ***Introduction to Grounded Theory: A Constructivist Approach***
Scholar Instructor: **Elaine Keane**
Dates: **Monday-Tuesday, July 27-28**

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

Scholar Instructor: Sarah Tracy

Dates: Monday-Tuesday, July 27-28

Have you ever 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 or simply need a refresher. 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 such as 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.
- To craft effective research questions, choose sampling strategies, and match data types to research goals.
- To practice participant observation and fieldnote writing.

- To design interview and focus group questions.
- About creative and artistic qualitative approaches, such as photovoice.
- How to organize and prepare qualitative data for analysis.
- A basic orientation to analytic strategies.
- To 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.
- To anticipate common challenges and learn strategies to address them.
- 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 Effective Qualitative and Mixed Methods Research Proposals*
Scholar Instructor: **Sharron Docherty**
Dates: **Monday-Tuesday, July 27-28**
This course presents pragmatic, concrete strategies for designing and writing effective and competitive qualitative and mixed methods research proposals. We will 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 will also cover strategies for addressing aspects of qualitative and mixed methods research 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 will highlight distinctions between proposals written for governmental, foundation, and private industry grant review audiences and showcase methods for locating potential funding mechanisms in the private sector.

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.

Researchers in academic, government, and not-for-profit sectors will all benefit from course content. The material is built for researchers across disciplines (e.g., clinical psychology, education, medicine, nursing, population health, public health, social work, sociology, anthropology, and more.)

JULY 29 (One-Day Courses)

Course: *Qualitative Data Generation: Conducting Interviews, Focus Groups, and Field Observations*
Scholar Instructor: Elaine Keane
Date: Wednesday, July 29

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 one-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 Publications, Inc.

- Roulston, K. (2010) *Reflective interviewing: A guide to theory and practice*, London: SAGE.

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

Scholar Instructor: **Cheryl Poth**

Date: **Wednesday, July 29**

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: *Story-Based Systems Analysis: How Individual Stories Illuminate the Inner Workings of Complex Systems*

Scholar Instructor: **Kristin Black**

Date: **Wednesday, July 29**

This course invites participants to explore how individual stories can illuminate the inner workings of complex systems. Through a qualitative lens, participants will learn to collect rich narrative data and use journey mapping techniques to trace how people move through and interact with systems—whether in healthcare, education, public services, or community life.

Participants will engage story-based systems analysis with systems thinking as a framework for understanding how personal experiences reflect broader structural dynamics. By constructing visual maps of systems and overlaying them with direct quotes and story elements from individual narratives, participants will uncover patterns, barriers, and feedback loops that often remain hidden in traditional analysis. These visualizations become tools not only for insight but for advocacy and change.

The course emphasizes data collection methods such as interviewing and story elicitation, while also introducing strategies for analyzing, interpreting, and presenting findings. Participants will learn to diagnose system-level issues by identifying recurring themes and tensions within individual narratives, and to communicate their insights through compelling visual and narrative formats.

Using story-based systems analysis equips researchers to surface actionable insights, support structural transformation, and contribute meaningfully to research, policy, and practice.

JULY 30-31 (Two-Day Courses)

Course: *Design Thinking in Qualitative Research: Practical Applications for Data Collection, Data Analysis, and Analytic Products*
Scholar Instructor: Liz Chen
Dates: Thursday-Friday, July 30-31

This course focuses on the benefits and practices of integrating design thinking (e.g., human-centered design) methods into qualitative inquiry. With roots in architecture, visual design, engineering, and business, design thinking (DT) complements qualitative research approaches by helping to foster emergent discovery and generate dynamic outputs with an emphasis towards action. This integration allows researchers to better engage their participants during data collection and data analysis stages while embedding an action-oriented, creative problem-solving approach into their qualitative research process.

This interactive workshop begins with a brief orientation to design thinking, and will blend mini-lessons with case studies and present opportunities for participants to practice select design thinking methods. Participants will also have an opportunity to engage with suggested GenAI prompts to enhance their integration of DT into qualitative research. While there are many versions of DT available, we will cover the methods offered by IDEO, the renowned design firm based in San Francisco, CA, and discuss the methods' purposes and applications to qualitative research data collection, analyses, and analytic products:

- Extremes and Mainstreams: Recruiting extreme and mainstream participants of your intended audience
- Analogous Inspiration: Drawing ideas and generating new questions from experiences or settings that are similar in some way to your topic area/challenge
- Download Your Learnings: Sharing your learnings so that your individual learnings become part of your team's collective knowledge
- Find Themes: Identifying patterns among data collected
- Design Principles: Turning themes into solution requirements
- Journey Maps: Creating a visual tool that tracks key moments and decisions in the solution from the participant's perspective
- Storyboard: Crafting comic-book style frames to show a component of your solution
- Rapid Prototyping: Learning through making and collecting feedback from participants

Course: *Enriching Implementation Research with Deeper Forms of Qualitative Inquiry*
Scholar Instructor: Alison Hamilton
Dates: Thursday-Friday, July 30-31

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-implementationscience-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: *Learning from Lived Experience Cultivates Your Qualitative Mind*
Scholar Instructor: **Mark Vagle**
Dates: **Thursday-Friday, July 30-31**

This 2-day workshop focuses on what "lived experience" means for qualitative researchers. We will introduce strategies that prepare us to study the world as it is lived, not the world as it is measured, transformed, represented, correlated, and broken down. In paying close attention to lived experience, we are interested in the felt and sensed aspects of our participants' and our own experiences, as well as the contextual aspects in which these experiences take shape.

Four commitments help us expand and enrich our qualitative minds as we learn from lived experience:

1. Listening to and making sense of this significance and using it in our qualitative research
2. Treating theorizing as an active and generative process of exploration
3. Putting this theoretical process to use in our data collection processes
4. Practicing data analysis using the theoretical tools we have learned

To learn about and ground these commitments, we will spend time exploring how a wide array of qualitative data such as interviews, observations, visual, and popular media can serve as data for studying lived experience. With data from Vagle's current studies of yoga and mindset work, we will further practice data analysis using the theoretical processes and tools we have learned. Participants are also encouraged to bring their own data and/or research ideas so they can apply these processes, tools, and techniques to their work.

Course:	*Qualitative Analysis with the "Sort and Sift, Think and Shift" Method: Launch or Refocus Your Work*
Scholar Instructors:	**Ray Maietta and Kevin Swartout**
Dates:	**Thursday-Friday, July 30-31**

This course equips qualitative researchers to use the Sort and Sift, Think and Shift method from the beginning to the end of a new project and exposes analysts in the midst of a current project to tools and strategies that can help them gain traction and direction in their work.

The Sort and Sift method is an iterative process in which analysts dive into data to understand its content, dimensions, and properties, and then step back to assess what they have learned to direct next stages of analysis and to position findings with current conversations in the field. The method is a data-driven process that is both flexible and fluid. Data content is directive as it guides researchers to strategic options for what to do when. The goal of the process is to arrive at an evidence-based meeting point that is a hybrid story of data content and researcher knowledge.

Three outcomes of the Sort and Sift approach connect, or re-connect, you with the depth of meaning in your data documents and ignite, or re-ignite, your motivation for the work.

1. *Discover the Authentic Story* - Engaging tools such as uninterrupted reading, quotation engagement, and episode profiling reveals the complete, authentic story of each data collection episode. In doing so, this process exposes themes within and across documents, showing how topics work together to form shared meanings and complex narratives.

2. *Break and Avoid Analytic Blocks* – It is not uncommon for analysis to stall, or even stop, as more data is processed. With tools working in sync to keep analysis in flow, the Sort and Sift process helps you overcome and avoid these blocks, foster discovery, and build rich stories of emerging themes.

3. *Ensure the Legitimacy of Your Work* – Prioritizing attention to the intentional language and stories of lived experience of participants increases the likelihood that you can answer yes to the question: "Does the data give me permission to make these claims?"

AUGUST 5-6 (two-day courses)

Course: *Coding and Analyzing Qualitative Data*
Scholar Instructor: Paul Mihas and Karen Campbell
Dates: Wednesday-Thursday, August 5-6

Coding serves as a heuristic (i.e., a method of discovery) to pay analytic attention to qualitative data using numerous possible lenses. It provides a foundation for analytic sense-making—including the ongoing development of categories, themes, and theories—and can also foster cognitive empathy, emergent discovery, and analytic precision.

This two-day course focuses on a select number of coding practices, including process coding and in vivo coding, and will provide opportunities for in-class exercises and activities. Participants will review:
- foundation principles for coding qualitative data
- how coding can generate visual displays and reflective analytic memos
- how different coding practices can be used in concert, rather than as isolated techniques
- how coding anchors analytic work by helping researchers identify patterns, explore conceptual relationships, and move toward categories and themes

Given that the emergence of artificial intelligence (AI) provides researchers with an intriguing new heuristic for qualitative data analysis, the course devotes one of the course modules to demonstrate and discuss possible uses of AI for coding data.

Course content is derived from Saldaña's *The Coding Manual for Qualitative Researchers* (5th edition, 2025; SAGE Publishing).

Course: *Qualitative Methods in Rapid Turn-Around Projects: Strategic Decision-Making for Rigor and Feasibility*
Scholar Instructor: Alison Hamilton
Dates: Wednesday-Thursday, August 5-6

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 for Applied Practice*
Scholar Instructor: Sally Thorne
Dates: **Wednesday-Thursday, August 5-6**

This course focuses on developing skills and confidence in designing and conducting a qualitative study for the purpose of generating knowledge in an applied field for translation into practice. We will consider applied qualitative research in theory, in process, and in context, working 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 and logic of philosophical, theoretical, and disciplinary positioning, sampling, data collection options, data analysis, 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 capable of generating outcomes that are trustworthy, credible, and appropriately aligned with the investigator's applied research aims. We will deconstruct how we know what we know in an applied qualitative project, and consider how we come to make knowledge claims, particularly evidentiary claims, on the basis of our qualitative investigations. We will delve into how applied qualitative

researchers transform data pieces into patterns and begin to make thematic observations that will develop into meaningful findings, allowing course participants an opportunity to wrestle with the intellectual mechanics that qualitative data analysis entails.

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

Course content is adapted from Dr. Thorne's book, *Interpretive Description: Qualitative Research for Applied Practice* (3rd ed., 2025, Routledge), available in [Open Access Format](https://tinyurl.com/tb3sjsep) (https://tinyurl.com/tb3sjsep)

Course: ***Writing for Impact: Strategies to Successfully Craft and Publish Qualitative Research***
Scholar Instructor: **Sarah Tracy**
Date: **Wednesday-Thursday, August 5-6**

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 especially useful for those grappling with revisions or responding to reviews. Participants should bring a writing project in mind, along with a sense of their intended audience(s) and goals.

By the end of the workshop, you will be able to:
1. Frame your research to capture your audience's attention.
2. Identify the most receptive publication outlets—including alternative representations beyond the journal article.
3. Recognize the distinct features of qualitative writing and the pros/cons of different approaches.
4. Understand the key "puzzle pieces" of a qualitative report—abstract, rationale, literature/conceptual framework, methods, findings, and implications.
5. Practice claim-making, theorizing, and explanation through writing heuristics.
6. Experiment with artistic and visual approaches (e.g., drawings, photos, word clouds, qualitative models).
7. Spot common pitfalls in qualitative writing and learn strategies to avoid them.
8. Navigate the publication process, including how to respond to reviewer critiques.
9. Consider the ethical use of AI in qualitative writing.
10. Apply these insights while your research is still in progress.

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 7 (one-day courses)

Course: *Collaborative Qualitative Research: From Data to Dialogue to Discovery*
Scholar Instructor: Kevin Swartout
Date: Friday, August 7

This course explores collaborative research as a purposeful methodological approach empowered by multiple vantage points and perspectives to unearth powerful facets and dimensions of data. Collaborative qualitative research engages multiple analysts to leverage their respective expertise, disciplinary backgrounds, and reading approaches to understand data deeply, then collectively assess what they are learning. Researchers contribute knowledge shaped by their own contexts to create productive dialogue that exposes assumptions, challenges premature interpretations, and generates new analytical directions.

This course addresses the methodological rationales and benefits of collaborative qualitative research, providing strategies for researchers at any stage - whether you're assembling a team, joining one, or reconsidering how your work might benefit from more collaborative approaches.

This course will build a foundation that will prepare participants to better:

1. Understand Data Content: Collaborative reading of qualitative data reveals the complete, authentic story of each data episode. When one team member jumps to interpretation, others might ask: "Does the data give you permission to make that claim?" This ongoing negotiation between what participants expressed and what researcher expertise discerns helps to preserve the authenticity of the data and builds evidence-based claims grounded in participant voices.

2. Move Through Data with Dialogue to Get to Discovery:
As researchers move from individual data collection episodes to understand content and processes that run through the entire dataset, collaboration can and should take many forms. Dialoguing involves conversational exchanges that do not occur only in team meetings. Colleagues think aloud together in emails, text exchanges, and hallway conversations. Researchers should record and reflect on much more than just the substance that emerges from those interactions. The content of the back and forth, including the logic and detail behind conclusions, is critical to discovery. When moving through data with dialogue to get to discovery, you are constructing the language of the study as a group.

To shape relevant and important publishable content, teams should prioritize the importance of "fit" in 3 important ways:
1) How do the ideas within each data collection episode fit with each other?
2) How do core ideas presented in individual data collection episodes compare across data collection episodes?
3) How do ideas, topics, and themes that research teams consider fit with existing literature and practices in the field?

3. Effectively Communicate Research Findings: Ongoing team dialogue fosters the ability for researchers to start writing early, concurrent with discovery and debate about the content and implications of what the research team is learning. In conversational exchanges throughout a project, researchers not only discuss what they discovered, but how they found it and how to write about it in

ways that bring readers along for the journey. Using qualitative techniques, like memo writing, is one of many strategies that facilitate this early writing process.

Course:	***Place-based Research Approaches to Understanding Local Communities***
Scholar Instructor:	**Rashawn Ray**
Date:	**Friday, August 7**

This course is designed for researchers and practitioners interested in understanding and engaging with local communities through contextual and location-specific research methodologies. Participants will explore the significance of place in shaping community dynamics and learn how to leverage local knowledge and resources to enhance research outcomes. Through collaborative discussions, case studies, and hands-on activities, attendees will gain practical skills and insights into conducting impactful research that respects and reflects community values and viewpoints.

Learning Objectives:
1. *Understanding Place-based Research:* Participants will gain a comprehensive understanding of place-based research principles and how they differ from traditional research approaches.
2. *Developing Contextual Awareness:* Learn techniques for cultivating a deep awareness of the cultural, social, and environmental context of local communities to inform research design and implementation.
3. *Engagement Strategies:* Acquire strategies for effectively engaging with community members and invested parties to co-create research initiatives that are relevant and beneficial to the community.
4. *Ethical Considerations:* Understand the ethical implications of place-based research and develop skills to navigate potential challenges related to consent, privacy, and community representation.
5. *Application of Tools and Methods:* Explore various tools and methodologies specific to place-based research, including participatory action research, ethnography, and geographic information systems (GIS), and learn how to apply them to make community and police change.

This workshop is ideal for researchers, community planners, policy makers, and anyone interested in leveraging local insights to enhance their research projects and community engagement efforts.

Course:	***Reflexive Thematic Analysis: Identifying, Analyzing, and Interpreting Patterns of Meaning***
Scholar Instructor:	**Karen Campbell**
Date:	**Friday, August 7**

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

Scholar Instructor Bios (Organized Alphabetically)

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 the UNC Gillings School of Global Public Health. 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 stakeholders 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*. Additionally, she is a fellow/trainee on the PCORI-funded Thriving Hearts project in the UNC School of Medicine. She partners with investigators around the country and is a co-investigator on funded grants at the Washington University in St. Louis, East Carolina University, and UNC. 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.

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 acting president of the Society for the Analysis of African American Public Health Issues.

She lives in Durham, North Carolina with her 7-year-old daughter.

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 critical 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 6ᵗʰ 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.

Liz Chen

Liz Chen is an Associate Professor in the Department of Health Behavior at the Gillings School of Global Health at The University of North Carolina at Chapel Hill. She is also Design Thinking Lead at Innovate Carolina, the unit at UNC-CH dedicated to innovation, entrepreneurship, and economic development where she works with faculty, staff, and students to integrate design thinking into their teaching, research, and practice. She teaches a popular design thinking course and has applied DT methods into qualitative research in the areas of adolescent sexual health, nutrition, school psychology, urban planning, and more.

Here are three recent articles that she has authored or co-authored that integrate qualitative research methods with design thinking:

- Chen, E., Bishop, J., Guge Cozon, L., Hernandez, E., Sadeghzadeh, C., Bradley, M., Dearth-Wesley, T. & De Marco, M. (2023). Integrating Human-Centered Design Methods Into a Health Promotion Project: Supplemental Nutrition Assistance Program Education Case Study for Intervention Design. *JMIR Formative Research*, *7*, e37515.
- Skywark, E. R., Chen, E., & Jagannathan, V. (2022). Using the Design Thinking Process to Co-create a New, Interdisciplinary Design Thinking Course to Train 21st Century Graduate Students. *Frontiers in Public Health*, *9*, 777869.
- Leos, C., Chen, E., & Jagannathan, V. (2023). Using Human-Centered Design Strategies to Identify Unmet Adolescent Sexual Health Wants and Needs. *Prevention Science*, 1-11.

Sharron Docherty

Sharron L. Docherty, Ph.D., PNP, is Vice Dean for Research and Associate Professor in the School of Nursing and in the Department of Pediatrics in the School of Medicine at Duke University. Her program of research focuses on examining how 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 for her research. 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 and has served as co-faculty in the Summer Institutes in Qualitative Research offered through the Center for Lifelong Learning at the University of North Carolina at Chapel Hill.

Alison Hamilton

Alison B. Hamilton, Ph.D., M.P.H., a VA 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

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). 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. 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 published at the University of North Carolina 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 4th (2017, Sage) and 5th (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.

Rashawn Ray

Rashawn Ray is Vice-President and Executive Director of the AIR Opportunity Fund at the American Institutes for Research, a 10-year, $225M initiative focused on addressing long-standing challenges in education, workforce development, public safety, and community health. The Fund works in partnership with communities and organizations to create evidence-informed, locally driven solutions that expand opportunity and improve lives.

In addition to his leadership at AIR, Dr. Ray is also a Professor at the University of Maryland and a Senior Fellow at the Brookings Institution. His research examines the underlying causes of racial and social inequities, with a focus on criminal justice reform, health policy, and wealth disparities. As the founding Executive Director of the Lab for Applied Social Science Research (LASSR), he developed a virtual reality training program for law enforcement and led implicit bias trainings for thousands of police officers, military personnel, and corporate leaders.

His academic contributions are extensive, including three books and over 50 academic articles and book chapters in leading journals such as *American Journal of Sociology*, *Science Advances*, *Social Science Research*, and *Du Bois Review*. His academic work has been supported by major institutions, including the National Science Foundation, National Institutes of Health, Ford Foundation, and the Robert Wood Johnson Foundation. He also served as Co-editor of *Contexts Magazine: Sociology for the Public*, which garnered over one million website views annually.

Beyond academia, Dr. Ray is a sought-after expert who regularly testifies before federal and state lawmakers, providing critical insights that shape policies on racial equity, public safety, and justice. His extensive media presence includes writing over 50 op-eds for top-tier outlets such as *The Washington Post*, *New York Times*, and *POLITICO*, and he has been featured as a key commentator on major

networks like CNN, Fox, MSNBC, BBC, CBS, and NPR. Dr. Ray's work and expertise continue to reach a wide audience, influencing public discourse on some of today's most pressing social issues.

Dr. Ray's expertise extends to several high-impact advisory roles, including:
- National Artificial Intelligence Advisory Board Subcommittee on Law Enforcement – Advises the President of the United States on law enforcement and AI.
- Maryland Governor's Task Force on Bias in Property Valuation – Focuses on reducing bias in property assessments.
- Legacy Renovation Scholars Committee, National Civil Rights Museum – Supports initiatives to preserve African American history.
- Meta Global Policy Council – Provides strategic advice on global policy issues.

His significant contributions to sociology and public policy have earned Dr. Ray numerous prestigious awards, including:
- Andrew Carnegie Fellowship
- AAAS Mani L. Bhaumik Award for Public Engagement with Science
- Public Understanding of Sociology Award, American Sociological Association
- Morris Rosenberg Award for Outstanding Sociological Achievement, DC Sociological Society
- Outstanding Young Alumni Award, Indiana University

Dr. Ray earned his Ph.D. and master's degree in sociology from Indiana University and his bachelor's degree in sociology from the University of Memphis. He also served as a Robert Wood Johnson Foundation Health Policy Research Scholar at the University of California, Berkeley, and was a member of the National Advisory Committee for the RWJF Health Policy Research Scholars Program.

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. (forthcoming). 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. (forthcoming). 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.

Kevin Swartout

Kevin Swartout (PhD from The University of North Carolina at Greensboro) is a Research Professor at Georgia State University in Atlanta, GA and he leads Rankin Climate, an agency focused on assessing and improving organizational climate. 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

over ten years. In this capacity, he has regularly taught short courses on qualitative and mixed methods research and frequently serves as a scholar at ResearchTalk's Qualitative Research Summer Intensive and as a mentor at ResearchTalk's Qualitative Data Analysis Camps. Dr. Swartout is a co-author on two recently published 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. 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, FCAN, CM is a Professor Emeritus of Nursing at the University of British Columbia, Canada where she has maintained a longstanding program of substantive research in the fields of chronic illness, cancer experience, and end-of-life care 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 Press), now in third edition as *Interpretive Description: Qualitative Research for Applied Practice* (2025, Routledge). She is Editor-in-Chief for *Nursing Inquiry* (Wiley), a journal that deals with critical scholarship in nursing and health care. She was a longstanding member of the advisory board for the International Institute of Qualitative Methodology, and now serves in an advisory capacity to the International Qualitative Research Network and the Asia-Pacific Qualitative Health Research Network, as well as consulting and speaking 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: https://nursing.ubc.ca/our-people/sally-thorne

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 and is author of *Qualitative Research Methods: Collecting Evidence, Crafting Analysis, Communicating Impact* (now in its 3rd edition with Wiley), a YouTube channel called *Get Your Qual On,* and more than 100 scholarly monographs. She has been honored as Distinguished Scholar by The National Communication Association, Fellow by the International Communication Association, and Distinguished Teacher by The Western States Communication Association. Stanford University's Scientist Career Rankings list her in the top 2% of scientists in the world across fields. 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 cuddling her rescue pup and kitten, yoga, and traveling with her husband.

Publications, open scholarship, an occasional blog, YouTube channel, and more information:
- http://www.sarahjtracy.com/
- https://isearch.asu.edu/profile/283948
- https://www.youtube.com/channel/UCs650R3zTPitGjT2GuqUGuw/videos
- https://twitter.com/SarahJTracy

Dr. Tracy has been a ResearchTalk/Odum scholar for 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.*