Tips on Learning Situational Analysis

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While we intentionally peppered the second edition of *Situational Analysis* with tips, there are a few more we want to offer and some we wish to underscore.

# Learning GT and/or SA is Layered Learning

While most things worth learning take time to get good at, methods usually involve a layered learning process. Those who have baked seven-layer cakes will have some idea. Each time you read, discuss, make a map, or write a memo, another layer of understanding sinks in, and your grasp of GT or SA densifies over time. Thus, getting good at GT or SA is a gradual process. To grasp more, learn when to stop for the day because you are too tired and when to ride your excitement further. Learning how to pace research is both challenging and crucial.[[1]](#endnote-1)

Reading reflections about using GT and SA in research projects can be especially useful. For GT, see Sbaraini et al. (2011) and Charmaz (2014). For SA, see Chapter 8 in this volume, Fosket (2015), and Clarke, Friese, and Washburn (2015). Reading strong examples of GT and SA work is also very valuable, especially within your own discipline or specialty. See Appendices B and C for suggestions.

# Generating Good Research Questions

Research questions are usually distilled from considerations of areas of interest, literature reviews, discussions with advisors and colleagues, and so forth, and they drive the research process in deep ways. Thus, they are well worth tinkering with and refining to help focus the research. It is important to remember here that both GT and SA are very good at answering “how” questions. In a recent workshop Carrie Friese taught, a student’s research question started with “why,” leading to far more individual-level and psychological elements on his messy situational map. Friese told him SA is very good at pushing micro-level studies to the meso level. While she certainly was not suggesting that he change his dissertation question, she asked if they might rewrite it for workshop purposes. Carrie then asked the group what the question would look like if it started with “how” instead of “why.” This rewording opened the project up to the group in a new way, and the student later said it really helped him to address what he was most interested in answering. He had not understood how to frame his question to fit his interests, a common problem among those new to research. This story also demonstrates how a gaining a grasp of “the social” may be part of the process of learning SA.

Refining your research questions is often one of the hardest parts of a project. Reconsidering your questions across the trajectory of the project will help. This involves doing a preliminary design, including initial situational mapping, then gathering some data, redoing the map, and writing memos. *Understanding your research questions is itself a* *process*. Do not despair! And theoretical sampling is there to help you ”fix” things down stream if and as your research questions ”evolve” in new directions, as good qualitative inquiries tend to do.

# Analyzing and Memoing ASAP and Relentlessly

The biggest mistakes we have seen in doing SA are the same as those in doing GT: not analyzing your data as soon as you start collecting and—even more fateful—not memoing adequately. Analytic sessions (alone or with others) should begin immediately after initial data are gathered to glean important leads and confirm which of the tired paths of prior research need not be pursued. Don’t reinvent wheels. Following Strauss, “Study the unstudied!” Follow through on the un- or underexplored areas. Alternatively, if your data seem to challenge the extant literature, pursue that.[[2]](#endnote-2) Things change! Important topics can be well worth revisiting, especially with new theoretical and/or methodological tools and/or after a major technological or other change in a topic area.

Memoing should begin as part of the design process, documenting what you considered and discarded, as well as future plans, thoughts, ideas, and so on. Memoing should occur *after every single analysis session* and should document the process, questions, conundrums, agonies, and happy outcomes of your efforts. If you are in a working analysis/writing group, memos should be done after one of those sessions too. For our collection of SA articles(Clarke, Friese, & Washburn, 2015), we asked authors to reflect on their experiences using SA. Several bemoaned that they had not memoed their collaborative sessions adequately.[[3]](#endnote-3) While the maps work as wonderful foci for collaborative work (discussed later), only through memoing can the insights generated be thoroughly incorporated into the ongoing research trajectory and final write-ups.

# Staying With Reflexivity

A major difference between early GT and constructivist GT and SA is the importance of reflexivity (see Chapter 2 and Figure E.1). While we cannot portray this for every research stage, from reflecting on why you chose your project onward, we urge you to stay with reflexivity as a part of your routine research process. You, individually or as a team, matter in infinite ways, in your research, and the more you are aware of this, the better. When you include yourself(ves) on the initial situational map, when you analyze your relations with the various other elements on that map, when you are surprised, upset, or gleeful during your research, all of these reactions matter. Understanding how and why and what the implications are for your project is part of the process, not some external “noise” or bias.

# What Doesn’t Seem to Fit or Work May be Analytically Important

As noted earlier, people often think they must be making a mistake or be wrong about something that seems not to fit or feel right as their analysis unfolds. “Staying with the trouble” (Haraway, 2016) and “getting lost” for a while (Lather, 2007) are our suggestions. *Doing analysis is an abductive process*. Trust that something feels odd to you for good reason. Your analytic antennae are vibrating. Sleep on it—perhaps for a while. If it keeps gnawing at you, return to it seriously, ideally with others in a group analytic discussion. Ask *why* it seems wrong and *how* it doesn’t fit. How could you theoretically sample and find out more about it? Through what kind(s) of data? Follow up and see where these knotty concerns lead you rather than ignoring them or hygienically tidying up the mess (Law, 2007). Such problems *can* turn into major analytic *solutions*.

# Learning to Write

We urge you to take learning how to write well quite seriously. In interpretive inquiry, our words carry a lot of the meaning, so it is well worth fussing.Finding one’s voice—or multiple voices—for a particular project is very important. Ask yourself these questions: What are the major goals of my project? Who are my possible audiences? Might they need to be addressed in different voices? Consider writing different kinds of articles for different audiences and venues. The role of public intellectuals—scholars who write for both academic and nonacademic audiences—is growing. This is increasingly recognized by many universities now grasping that their reputations are made in social media and magazines, as well as traditional scholarly venues.

Write so that a tired reader can engage with your writing. Charmaz (2012; 2014, Chap. 11; 2015) has taught writing for decades and offers excellent support. Share your work whenever possible in working groups and at local presentations and conferences in early research and career stages. Thank readers for difficult, as well as positive, remarks. Even though they sting at the time, the sting wears off, and we usually learn more from the comments that are difficult to swallow. Often, we have simply been unclear. Through such group exposures of your work, you will learn that you can’t please all of the people all of the time—your critical readers will disagree, and you are the ultimate arbiter—however challenging that may be.

# Notes

1. . Glaser’s (1978, pp. 18–35) chapter on “Theoretical Pacing” is very useful. Glaser, B. G. (1978). *Theoretical sensitivity: Advances in the methodology of grounded theory.* Mill Valley, CA: Sociology Press. [↑](#endnote-ref-1)
2. . For example, Martinez’s (2012) GT and SA study challenged the long-cherished “acculturation thesis” regarding Latino health, which asserted that migration to the United States was requisite for the adoption of bad dietary practices compared with their home countries. In contrast, Martinez found that modernization and globalization of food production and distribution already had, for many years, negatively affected dietary practices across most of Latin America via consumption of processed foods. Moving to the United States was not requisite, although diets may have worsened for those who moved. See Martinez, A. D. (2012). Reconsidering acculturation in dietary change research among Latino immigrants: Challenging the preconditions of US migration. *Ethnicity & Health*, *18*(2), 115–135. [↑](#endnote-ref-2)
3. . See, e.g., French and Miller (2015, pp. 314–322) and Gagnon, Jacob, and Holmes (2015, pp. 285–291)*.* French, M., & Miller, F. A. (2015). Leveraging the “living laboratory”: On the emergence of the entrepreneurial hospital. *Social Science & Medicine*, *75*, 717–724. Reprinted in A. E. Clarke, C. Friese, & R. Washburn (Eds.), *Situational analysis in practice: Mapping research with grounded theory* (pp. 292–313). London, UK: Routledge. (original work published 2012) Gagnon, M., Jacob, J.-D., & Holmes, D. (2015). Governing through (in)security: A critical analysis of a fear-based public health campaign. *Critical Public Health*, *20*(2), 245–256. Reprinted in A. E. Clarke, C. Friese, & R. Washburn (Eds.), *Situational analysis in practice: Mapping research with grounded theory* (pp. 270–284). London, UK: Routledge. (original work published 2010) [↑](#endnote-ref-3)