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Mapping a Way Into Qualitative Inquiry: Reflections on Learning and Teaching Clarke's Situational Analysis

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Key words:

situational
analysis;
theory/methods
package;
mapping;
qualitative social
research;
qualitative
methods
instruction

Abstract: In this essay I make a case for Adele CLARKE's situational analysis as an example of a theory/methods package which can help those approaching qualitative social research from professional fields not traditionally associated with qualitative methods to produce relevant and new knowledge. I base both my argumentation and my personal reflections in this text on my own experience as a newcomer to qualitative social research from professional fields at the intersection of medicine and language. I first discuss what theory/methods packages are and how they matter to all scientific work. I then give a brief introduction to situational analysis, with special emphasis on those aspects which I find particularly helpful to learners of qualitative social research. Lastly, I share some reflections about learning and teaching situational analysis and suggest approaches to its application to postgraduate research methods instruction.

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1. Introduction

I am a *Quereinsteigerin*¹ in the field of sociological inquiry. A few years ago, I embarked upon doctoral studies in health sciences in Norway. Leaving a very fulfilling career at the intersection of medicine and language interpretation in the United States, I moved first to Germany and then to Norway, a place where my continued work in medical interpretation was highly impractical. Compelled as I was by circumstance to change course, I returned to postgraduate university studies and sought out a new career. I wrote a master's thesis in the field of disability and society, and when it was suggested to me that I apply to the doctoral program in health sciences, I believed I would have a head start based on my familiarity with the medical field, coupled with my newly-minted social constructivist convictions. Alas, as readers who have traversed this path before me will already know, many aspects of my journey differed from the way I had imagined things would be. Mostly, in the end, for the better. [1]

As mentioned above, my first professional engagement with science consisted of exposure to medical science in an arena where *getting it right* was vital, literally speaking. My assumptions approaching the doctoral work, namely that the baggage I brought with me from my former professional life would serve me well also in this new terrain, were largely misplaced. This fact, however, was not immediately obvious to me. The reasons for this were surely a combination of the typical (communication issues on multiple levels—by that time I had a good handful of languages under my belt, but now I was operating in Norwegian, a language still relatively new to me) and the idiosyncratic. It was in the course of learning situational analysis—almost by coincidence—that I began to understand the implications of the mismatch. My copies of "Situational Analysis" (CLARKE, 2005; CLARKE, FRIESE & WASHBURN, 2018) became for me a repository of teachings on method, but crucially, also on theory and on theory of science. It was by learning the theoretical, philosophical, and methodological underpinnings of situational analysis that I first understood that my former practice had also had its own underpinnings, but that these had been tacit, taken for granted. Learning to see this difference represented a turning point in my *becoming a sociologist*, from having been something else before, a metamorphosis which I will not claim to have completed, but which I am enjoying more and more. I only wish it had happened sooner. Hence this essay. [2]

The account presented here is necessarily rooted in my own experience at my own institution. Nevertheless, the broader phenomenon at the heart of this text, that of non-sociologists trying to answer sociological questions, is not unique to me. In fact, approaching qualitative social research (QSR) from the outside, whether as a member of a research team or as a career-changer after having studied and practiced in another field or profession, is a phenomenon which has been on the rise especially with the turn to interdisciplinarity. And it is positive that

1 This word, sometimes translated as "career changer" or "lateral entrant," denotes a person who changes not only jobs, but career paths. It emphasizes lateral movement, which implies not starting (completely) from the beginning in the new field, the consequences of which can be some initial knowledge gaps which must be filled.

scientists in fields which historically have been steeped in quantitative ways of knowing have increasingly come to appreciate the value of knowledge gained through qualitative research and come to view such research as legitimate. The idea that there is value in lifting the gaze, in deepening understanding, in working together, in knowing or being (good at) more than one thing should not really surprise anyone who studies the social. Sometimes, however, systems need a push. [3]

In this essay I make a case for Adele CLARKE's situational analysis (SA)² as an example of a theory/methods package which can help those approaching QSR from professional fields not traditionally associated with qualitative methods to produce valuable, relevant new knowledge. I base both my argumentation and my personal reflections in this text on my own experience carrying out doctoral work as a newcomer to QSR from professional fields at the intersection of medicine and language. I first discuss what theory/methods packages are and how they matter to all scientific work (Section 2). I then give a brief introduction to situational analysis, with special emphasis on those aspects which I find particularly helpful to learners of QSR (Section 3). Finally, I share some reflections about learning and teaching situational analysis and suggest approaches to its application to postgraduate research methods instruction (Section 4). [4]

2. Theory/Methods Packages

All research methods, regardless of the field of study they are designed to investigate, are theory/methods packages, i.e., a nonfungible combination of "both epistemological *and* ontological assumptions along with concrete practices through which a group of practitioners can go about their work" (CLARKE et al., 2018, p.24; CLARKE & STAR, 2008). The term *theory* here encompasses both epistemologically compatible (sociological) theory—often in terms of sensitizing concepts (BLUMER, 1969)—and also methodology, in terms of a complex of interlinking theoretical perspectives and a set of tools designed to help render visible and address the complexities of (social) phenomena (CLARKE & KELLER, 2014). That is to say, approaches to and techniques for posing a research question, for identifying, collecting, and analyzing data, and for reporting the results of the inquiry are always based on a specific set of assumptions about the nature of the world and of knowledge about it (MOSES & KNUTSEN, 2019 [2007]). Any impression that this is not the case is likely based on the fact that in many fields of study, the fundamental assumptions have become so implicit as to have taken on a quasi-axiomatic quality. [5]

By introducing the concept of the *theory/methods package*, Susan Leigh STAR (1989) drew explicit attention to the fact that methodological and theoretical assumptions always undergird any attempt at systematic meaning-making.

2 When abbreviating situational analysis in English-language texts, authors should use CLARKE et al.'s own abbreviation, SA (2018, p.1). For German-language texts, the abbreviation *SitA* has been introduced for *Situationsanalyse* in order to avoid confusion, as SA is already a widely-used abbreviation in German for *Sturmabteilung* with negative connotations due to the Nazi past.

CLARKE and her co-authors (2018) exemplified this by writing extensively about the links between the cartographic tools which are employed in situational analysis (see Section 3 below) and the fundamental scientific world views—e.g., symbolic interactionism, pragmatism, and feminist theory—which shape their design and inform their use. In this way, they helped learners of QSR generally and situational analysis specifically to understand that perspectives on *what is* and on *how it can be known*—and by whom—are inextricably linked together. Thus, matters of theory, method, and methodology are particular to each other, "rather than the precepts of a particular discipline" (p.366), meaning that theory/methods packages are something that should be chosen to fit the research question at hand, rather than becoming dogmatically embedded in a discipline. [6]

A perhaps underappreciated point worthy of mention here is that theory/methods packages do not spring forth spontaneously from nature; just as STRAUSS (1978) and CLARKE and STAR (CLARKE, 2005; CLARKE & STAR, 2008; CLARKE et al., 2018) have pioneered the theory/methods packages mentioned here, new questions may require new approaches, and "researchers may well want to pull in concepts from elsewhere, or tweak a map to do some other kind of work. The issue then becomes making things *very explicit*" (CLARKE et al., 2018, p.367). Researchers should reflect carefully, both during the research process and in their texts, about fundamental philosophical and theoretical (in)compatibilities between theory and methods they are considering using together (see, e.g., LEGER, 2023). [7]

3. Situational Analysis

Situational analysis is a good example of a theory/methods package that is already assembled and very explicit about its program. CLARKE, in the second edition of "Situational Analysis" together with Carrie FRIESE and Rachel WASHBURN (2018), guided learners towards an understanding of core tenets of the method, some of which are described below. One of the big benefits of teaching using a theory/methods package like situational analysis is that it is complete in itself and internally consistent; it consists of theoretical perspectives on the world and of techniques for gathering and analyzing data about that world which make sense together. As a starting point for research, it is sufficient. It may be expanded with additional sensitizing concepts or methodological innovations but does not require these. This means that newcomers can *do* the method while they're growing into the theoretical foundations for it. They'll have lots of aha moments along the way and mature as a qualitative researcher as they practice, without having to earn a degree in sociology first. It also means that newcomers who avail themselves of the second edition of the text do not first need to learn grounded theory methodology (GTM); situational analysis is complete on its own. That said, the two methods "share many epistemological and theoretical roots, the more you know GT—and related social theory—the richer your grasp of SA" (p.361). Key, regardless of prior knowledge, is that learning research methods is

"layered learning" (p.351) and facility with method increases gradually and with practice.³ [8]

The ontological and epistemological compatibility situational analysis exemplifies is also manifest in an openness to expansion of the method with other compatible concepts (pp.61ff.). Advice to participants in workshops taught by CLARKE, WASHBURN and FRIESE⁴ frequently turns on the point of the method existing to facilitate the researcher's thinking with their data. CLARKE and WASHBURN have described successful analysis sessions as "deep play" (personal communication, May 18, 2017), and FRIESE has encouraged researchers to "try it out and see what happens" (personal communication, July 21, 2020), highlighting that not everything you attempt will end up being helpful, but that the worst that can happen is that it's a dead end and then you try something else. Far from representing a sort of anything goes-eclecticism, this openness and encouragement to creativity helps new researchers learn how to trust themselves as analysts—as opposed to trusting in a rigid proceduralism—and how to evaluate the applicability to their data of a particular theoretical or methodological approach. [9]

In terms of its ontology, situational analysis takes a materialist social, relational, ecological, and emergent—rather than pre-structured and fixed—view of the world. With its feminist epistemology, it holds that the understandings of our living in this world together to which we can come will always be perspectival, partial, contingent, and situated; liberatingly, at least in part, there is no one "right answer" to be sought, i.e., something objectively, universally, and eternally true like the answer to a math problem with *two lines underneath*. Likewise, abductively theorizing is enough; we are past the era of grand theory (CLARKE et al., 2018, p.349). In keeping with its interpretivist orientation, these interpretive and theorizing activities are work done by the researcher—rather than a piece of software⁵—in all their complexity, by engaging with the world, as part of the situation under study, as a highly reflexive co-creator of data. [10]

In contrast to other methods' focus on, e.g., basic social processes, action, or the individual, in situational analysis, "the situation per se becomes the ultimate unit

3 I am not suggesting that situational analysis is easy to grasp for those not trained in qualitative analysis. Indeed, this is a challenge I note elsewhere (EVANS-JORDAN & SKOLBEKKEN, in prep.). However, this is not unique to any specific method, but is a challenge common to learners of new research paradigms. Learning situational analysis as a newcomer to QSR is absolutely possible, and those who pursue this course may benefit, as I did, from their intrinsic motivation to learn and from learning in working groups. Note: When employing situational analysis mapping techniques collaboratively with study participants who are not pursuing QSR, I suggest using adaptations, or lay versions, of the maps, and reflecting carefully through memoing on the differences in type and purpose between the mapping the researcher does on their own and that which they do with participants (ibid.).

4 All reports here are personal communications in the framework of participation in multiple workshops with CLARKE, WASHBURN, and FRIESE between 2016 and 2021.

5 The distinction I am drawing here is between the analyst learning to recognize and trust their own analytical abilities and their own interpretive voice versus an exaggerated trust in externalizing that work; that inputting data into a computer program and "pressing start," or following certain analytic "steps" will lead them to the "right answer." CLARKE et al. (2018, p.124) warned about these "potential dangers" especially for those who are anxious about their own analytical abilities "and/or new to qualitative inquiry."

of analysis, and understanding its elements and their relations is the primary goal" (p.xxv). There are four main heuristic cartographic tools employed in data collection and analysis (CLARKE, 2019; CLARKE et al., 2018; FRIESE, CLARKE & WASHBURN, 2022), each designed to help the researcher "[construct] the situation of inquiry empirically" (CLARKE et al., 2018, p.xxv) and to give them *time with* and *in* their data in different analytically productive ways. At clear advantage are those researchers who participate in a working group on the pattern of those which Anselm STRAUSS led at the University of California, San Francisco, a practice encouraged throughout the second edition of "Situational Analysis" (CLARKE et al., 2018; STRAUSS, 1987). Mapping activities, whether alone or in a working group setting, are always to be accompanied by memoing, which is where a major component of the work of analysis takes place; *writing it out* and *working it out* are two sides of the same coin (CLARKE et al., 2018; DYSTHE, HERTZBERG & LØKENSGARD HOEL, 2010). For the complete and authoritative descriptions of all these techniques, please consult the references above. In the following, I give a brief description of each of the mapping techniques as I have come to understand them, with emphasis on how I have found them helpful in my own work. These descriptions are followed by brief commentaries on the significance of memoing and working groups. [11]

3.1 Situational maps

Situational maps are a place to collect, keep track of, and account for all the *things*, which CLARKE et al. called *elements*, in the situation of inquiry. They are "made and remade across the full trajectory of the project" (2018, p.130). Situational maps have two versions: messy and ordered. Messy situational mapping is the collection of all of the elements found empirically in the situation, intentionally unorganized and "decentered," i.e., not centered on any specific element—especially "the knowing subject," allowing that "other 'things' come into view" (p.14). This has the effect of deliberately including, e.g., non-human, material, and discursive elements in the scope of the analytical gaze. Ordered situational mapping is the examination and categorization of each element from the messy map under headings of *kinds*: e.g., human or nonhuman, individual or collective, discursive, political, economic, cultural, and implicated—or silent—actors (p.131). Importantly, elements may be "multiply ordered" (FRIESE, personal communication, July 21, 2020), meaning that they can be categorized as more than one type of element. Staying with elements long enough to see them as multifaceted and exploring what that might mean for their role(s) and relationships in the situation can be a very productive analytical investment early in a project. [12]

My initial situational maps were populated with many generic elements I knew I would find empirically because of my prior knowledge of the field, but also some elements which I guessed I may find empirically but did not. These, having proven irrelevant, fell off subsequent maps as I learned more, e.g., about the institutional and organizational peculiarities of my specific situation. New elements were added as I collected data and began my analysis. Over time, my situational maps transformed from a representation of what I thought in the study

design phase⁶ to what I found empirically as I got to know the situation better. The more I refined the maps, the easier it became both to keep an overview and make sure I could be accountable for all the elements, and to focus in on elements and relations that seemed especially interesting analytically. [13]

Early in my project, my work was focused on a specific political process which was designed to make substantive changes to the public service which I was analyzing. Soon after I began, a second political process was initiated which would transform the service in even more comprehensive ways. Watching my situation evolve in real time made me wish for a figurative pause button to press, but my situational maps were key to keeping control of everything as I made the decision to expand the scope of the project. New questions about *how we had gotten there* began to emerge as part of the exploration of these two processes in tandem, which made looking back in time as well practically an imperative. The logic behind the situational maps, of erring first on the side of inclusivity rather than arbitrarily defining certain things as being outside of the situation of inquiry was perhaps initially irritating to my long-suffering supervisors, who were desperate for me to delimit my study, but also provided me, in all their messiness, a reassurance that I wasn't too hastily narrowing my analytical gaze. [14]

3.2 Relational maps

Relational maps, likely due to the fact that they are made from, or as an extension of, messy situational maps, were mentioned somewhat in passing in the earlier situational analysis texts. Readers of the early texts would be forgiven for coming away with the impression that there were three main mapping techniques. In the more recent texts, however, CLARKE (2019) and her co-authors (CLARKE et al., 2018; FRIESE et al., 2022) have given relational maps increased focus, breaking out their description from that of situational maps, focusing on them as one of *four* mapping techniques central to situational analysis. This is fortunate, as the work done with relational maps can be much more analytically fruitful than simple mind-mapping. Relational maps are made by taking the most complete messy situational map at a given stage of the research and making multiple copies—as photocopies or multiple versions in computer presentation software. For each relational map, the analyst focuses on one particular element at a time and interrogates the relationship—or lack thereof—between it and each other element on the map. CLARKE et al. (2018, p.140) acknowledge that "relational analyses using situational maps are usually not particularly exotic, but rather provide a systematic, coherent, and potentially provocative way to enter and memo the considerable complexities of a project laid out in a situational map." [15]

My early relational maps were, like my early situational maps, reflections of my assumptions about important relationships. They also heavily favored human relationships and neglected non-human ones. Nevertheless, they gave me, even in my inexperience, a jumping-off point for my exploration. Recently, I have found

⁶ "The messy situational map in SA is a superb tool for research design" (CLARKE et al., 2018, p.361) also for projects that do not end up as fully-fledged situational analyses.

relational maps helpful in two ways I could not have anticipated when I began: In one, I was encouraged by a fellow researcher in a working group meeting to use relational maps to solve a conundrum I was having trying to map social worlds (see Section 3.3) in a historical time in the situation before I really felt like they were acting like worlds. Following this suggestion allowed me to see constellations of actors and the objects of their emerging common interest, together with historical and material contingencies, as well as political and social discourses, etc., at a stage where the *idea* of a commitment to common action was still being probed and negotiated. Although I had started examining the collectivities of my situation using the social worlds/arenas maps and theoretical framework, it turned out that shifting to relational mapping gave me a new and more productive way into theorizing about these historical potential proto-worlds which was not prefigured by assumptions about then-future commitments. [16]

In the other, I was inspired by a discussion in another working group meeting to take my place on the map *seriously*. Many of us forget to include ourselves on the situational map, or when we do remember, we likely scribble our initials, or perhaps only our first name, somewhere down low in a corner somewhere, hastily, perfunctorily, paying lip service to the injunction but not really taking account of ourselves and our relationship to the situation. Perhaps we have been warned not to overestimate our own significance. Perhaps we have yet to embark upon the journey of deep reflexivity, or, having started along the path, have found it difficult and uncomfortable and have turned off into milder terrain. Perhaps we have been focusing on completely legitimate other things in our research. In this particular working group meeting, group members noticed what seemed to be an underexplored significance of the presence of the researcher *in* the situation, *with* and *for* participants. After the meeting, I dug out some of my fieldwork memos and discovered that there was, perhaps expectedly, a lot about *me* in them: my being present, with different people, experiencing different sites and different spaces, being introduced to different objects and materials, different people and collectivities, listening to different stories and different concerns, etc. There was also a lot about how I fit, sometimes uneasily, into my social and physical surroundings, how it seemed to me that I was perceived, how the human actors in the fieldwork situation and I reacted and related to each other. Looking back on these memos, I pondered the exercise central to relational mapping: to pursue "these relationships systematically, one at a time, from every element on the map to every other" (CLARKE et al., 2018, p.138). I had examined relationships between plenty of elements on the project, but thus far I figured in none of them. This was the case despite pages and pages of memos in which I was accounting for my presence in the situation, at least as it related to fieldwork. I began to wonder if I were still missing any important connections, and decided to explore the idea of relational mapping for reflexivity. Doing relational mapping and memoing with a focus on one's own relationships to the elements in one's situation provides time and space in the project work for deep reflexivity and an explicit accounting for the researcher's place in the situation. This exercise can, in some respects, be as excruciating as it is enlightening in others, but can also, especially when repeated from time to time, provoke new insight about the relationships between the researcher and their situation. [17]

3.3 Social worlds/arenas maps

Social worlds/arenas maps provide a way to empirically and analytically visualize the different collectivities, or *social worlds*, of relevance to the situation of inquiry, situated around an *arena* of common concern (CLARKE & STAR, 2008; CLARKE et al., 2018, pp.148ff.; STRAUSS, 1978). Both arenas and the social worlds which are shown converging around them are depicted by CLARKE et al. (2018, p.152) using oval shapes with perforated lines, emphasizing that they are porous and constantly subject to change. Arenas are typically drawn so that they fill a good deal of the page, giving room for showing all the social worlds that are active in them. Social worlds can be drawn overlapping each other where this reflects the empirical situation, and smaller collectivities, called subworlds, can be shown contained within them. The presence of organizations and implicated actors can also be represented on social worlds/arenas maps. Doing this mapping can help the researcher explore areas of discursive, cooperative, and strategic overlap and distance between collective actors, and to account for surprises such as collectivities one might have expected to find in an arena, but which do not seem to be acting as a group. Likewise, they help to make visible actors who are implicated in the situation but are discursively figured by others rather than representing themselves. One of the strengths of social worlds/arenas mapping which I have come to appreciate most is its infinite scalability, not only in the analysis of large or small social worlds, but especially when social worlds at different levels of social organization all converge on the same arena of concern. Being able to take into account the presence both of national governments and of local patient advocacy groups is one of the democratizing moves situational analysis helps researchers to make, as I will also demonstrate with regard to positional mapping in Section 3.4 below. Though these groups may not, in the real world, have access to the same forums, we can put them around the same table analytically, paying attention to matters of access and power dynamics. All of this facilitates the researcher's accounting for and analyzing of how individuals and groups both cooperate and compete on areas of common concern. [18]

My work with social worlds/arenas mapping, and crucially, the theory upon which they are based, reflects the transformation I have already noted above, from starting to *do* and then *growing into* the theory. I started to make these maps before my grasp of the theory was anything more than tenuous. My initial maps were populated with social worlds which I knew at that point empirically to be relevant to the situation, at least the main ones. They were beautifully color-coded, overlapped very neatly in aesthetically pleasing arrangements, and besides cataloging some of the central social worlds, utterly unhelpful analytically. The more of the theory I read, the messier my maps became. The colors were ditched, the sizing and the overlapping became irregular, *uglier*, and much more representative of the complexities of the empirical situation. When I didn't need things to be pretty anymore, I could use the map as an analytical tool, as had always been intended.⁷ [19]

⁷ On the relationship between SA analytical maps and SA "project maps" and when and how to create the latter, see CLARKE et al. (2018, pp.154, 202ff.).

3.4 Positional maps

Positional maps are the main discourse-analytical tool in situational analysis. *Positional* here refers to different standpoints, or positions, which can be taken on specific—often contested—issues of concern in the situation empirically. These positions are plotted along vertical and horizontal axes, which facilitates analyzing them in relation to each other and also identifying positions which are possible, but which are not found empirically in the situation (CLARKE et al., 2018, pp.165ff.). This type of map can, especially for those new to analysis of discourse, be the most challenging to understand and to use. Positional mapping is most fruitfully done when the researcher is already in a position to navigate comfortably the significant discourses in their situation, seeing them in relation to each other and, importantly, *deliberately uncoupled from their authors*, and are thus generally—though not always—the last of the four types of analyses undertaken (pp.160f., 165ff.; see also CLARKE, WASHBURN & FRIESE, 2022, p.15; FRIESE, personal communication, July 21, 2020). Choosing the axes along which to plot the discourses can be, at least initially, a mysterious process. Certainly, facility with positional mapping is something which only can be achieved through time and persistent practice, though good coaching helps a lot. And though I am still working towards such a facility, one of my most rewarding moments of abductive surprise (REICHERTZ, 2007; TAVORY & TIMMERMANS, 2014) came through doing a lot of intensive work with my positional maps. [20]

As was the case with the rest of the maps, my initial use of positional maps bore the hallmarks of an inexperienced map-maker. This is not really a concern at all; the important thing is to start somewhere and stick with it. Using three pairs of axes, I had created six maps (three each at two different timepoints) in which I hoped to be able to visualize a discursive shift I believed I was seeing. In retrospect, these were nothing more than a confirmation of *what people were saying* about different aspects of the issues, without any real analytical muscles being flexed⁸. Workshopping my maps with Carrie FRIESE was the first key to unlocking the potential of the maps for me. She advised me to collapse the six maps into just two: *one* for each timepoint, but keeping *all* the significant positions. Then she advised me to radically rethink the axes, and counseled that if it seemed a position didn't *fit* on the map anymore, it was the fault of the axes, not of the position. This was definitely a bramble bush! I left the workshop with a lot of homework and a very crowded map. First on my own and later with my dissertation supervisor, I collapsed, or integrated, the positions which were substantively the same, moved them to their new places on the map, and tweaked the axes to make sure they were reflective of what was happening empirically in the situation. I started to wonder whether the first and second time points were not actually representative of the same discursive situation at all, as I had tried to frame them, but were perhaps, due to major changes in the larger situation, substantively different to each other. I continued thinking and memoing about it, and then I took the whole thing back to the working group. We stared hard and lost ourselves in countless rounds of moving and challenging and

8 This is akin to the problem of regurgitative description I discuss in Section 4.1, just fancier.

collapsing. Then, in the middle of it all, I felt as if something important were falling into place. This was simultaneously reassuring—I was learning to wield the tool, and exciting—now I was sure I knew what finding something using the maps felt like, and also a little scary: I understood that the implications of my research could not be neutral. [21]

3.5 The role of memoing

CLARKE et al. (2018, p.106) wrote that "spending time with the data" and "*memoing a lot*" are the main ways to really come to know and understand, or to "digest," as they wrote, your data. They continued:

"Memoing is an approach to processual and analytic note making across the trajectory of a project. [...] Every interview, observation session, reading of project-related documents, and analytic session (done alone or with others) should provoke one or more project memos about it" (ibid.). [22]

Just as maps are where you take care of your data, memos are where you take care of your analytical ideas, your questions to pursue, and your moments of abductive surprise. They serve as a mechanism for making yourself articulate your developing ideas and for preserving the analytical work that they record. Memos written after working group sessions are the source of many of the reflections in this essay. Consider the utter waste it would have been for me had I allowed all those super-productive working group sessions to simply exist as fun memories before passing into the oblivion of forgetfulness by not writing things down: "Inadequate memoing is the major problem of almost all qualitative research projects. Scribbled notes are always better than nothing, and thoughtful memos entered on the computer are intellectual capital in the 'project bank'" (p.107). Make memoing in parallel a habit during mapping and analysis sessions. Interrupt the work whenever needed so you can make a note of things that seem helpful or require follow-up. And above all, stop analyzing while you still have enough energy to at least make notes on your session. [23]

3.6 The role of working groups

The reader may have noticed my repeated reference to *working groups* in my account of my project work using situational analysis. On learning situational analysis in small group constellations and employing cooperative analysis in research projects, CLARKE et al. (2018) noted:

"The goals here are learning how to map together and how to work analytically in a small working group. This is the traditional way of learning and doing GT, pioneered by Glaser and Strauss and utilized widely—not only for student groups (e.g., Strauss 1987; Clarke & Star 1998) but also for team projects among experienced researchers (e.g., Lessor, 2000; Wiener, 2007). It is now used for SA as well" (p.109). [24]

While working cooperatively in this type of configuration may be a matter of course for many readers among whom this tradition has long since taken root

(e.g., REICHERTZ, 2013; RIEMANN, 2005), this was initially not the tradition to which I was exposed, and I spent—contrary to the interactionist ideals upon which situational analysis is built—far too much time trying to get it right on my own. Situational analysis was (and is) not a formal course offering at my institution,⁹ and so I was left largely to my own devices, doing my best with the first, and later, the second editions of "Situational Analysis" (CLARKE, 2005; CLARKE et al., 2018) and availing myself of paper sessions and workshops like those offered by CLARKE and WASHBURN at the International Congress of Qualitative Inquiry and by FRIESE at the University of Tübingen.¹⁰ Later, I roped my dissertation supervisors into our own tiny working group. Crucially for me, it was through the networking that accompanied the conference and workshop sessions that participation in working groups became a possibility. I cannot overstate the significance of cooperative learning and teaching for my progress both on my project and as a researcher. Re-readings of the GTM and situational analysis texts with attention to cooperative analysis make this point obvious, but I simply had not experienced it before; it was a matter of seeing and saying. CLARKE and others who worked with STRAUSS stressed that this was a central and indispensable feature of theorizing work from the earliest days of grounded theory methodology (CHARMAZ & CLARKE, 2019; CLARKE & STAR, 1998; CLARKE et al., 2018; LESSOR, 2000; RIEMANN, 2005; SCHIPPLING & ÁLVAREZ, 2019; STAR 1997; STRAUSS, 1987; WIENER 2007). Other authors have also asserted the significance of understanding learning and teaching and our scientific enterprise cooperatively (BAUMGARTNER, EVANS-JORDAN, LEGER, SCHWERTEL & URBANCZYK, forthcoming; BLUMER, 1969; LAVE & WENGER, 1991; TAVORY & TIMMERMANS, 2014). [25]

4. Reflections on How Situational Analysis Can Help Newcomers to Qualitative Social Research

In the following, I reflect on how situational analysis can benefit newcomers to QSR, especially those coming from fields where positivism dominates scientific work and thought, however tacitly. In doing so, I point out some of the features I have experienced at the institutional level which undermine efforts to counter this dominance when students embark upon qualitative projects. I make concrete appeals aimed at increasing awareness of these under-communicated issues. [26]

4.1 The problems of positivism

It is worth remembering that both grounded theory methodology and situational analysis had their origins in work done at a School of Nursing. But while GTM was meant to produce qualitative research which could measure up to quantitative standards (BRYANT, 2021), in developing situational analysis,

9 Carrie FRIESE was invited here to teach a situational analysis workshop in 2019, and generously keynoted a 2020 workshop which I led. The latter was followed by a situational analysis reading group with doctoral candidates and instructors of qualitative research methods.

10 The [International Congress of Qualitative Inquiry](#) (ICQI) has been held at the University of Illinois at Urbana-Champaign in the United States since 2005. Ursula OFFENBERGER and Jörg STRÜBING generously facilitated my participation in a 2020 SA seminar with Carrie FRIESE.

CLARKE came down firmly on the side that qualitative research was justified in its own right. She sought to remedy what she termed the "positivist recalcitrancies" (CLARKE et al., 2018, p.23ff.) in GTM, which present a great temptation to researchers coming, as I did, from the medical and health professions, as positivism represents a sort of comfort zone for them. Researchers coming from these professions and others with similar epistemic orientations will likely be carrying positivist baggage with them, or will have *positivist reflexes*, as my dissertation supervisor termed it in my case. In creating situational analysis, CLARKE addressed the remnants of positivist thought in GTM head on, simultaneously enumerating and correcting them in what was, for me, a grand reorientation of my way of thinking about what QSR was meant to be and to be able to achieve. A central aspect of these positivist reflexes is the drive to find the supposed "right answer," which drive is often imported unnoticed, and thus unaddressed, in the baggage of newcomers. In some professional fields, finding objectively right answers can mean the difference between life and death. In such cases, being confident that one knows the right course of action in a given situation can be experienced as a great reassurance. [27]

In social research, on the other hand, answers are rarely final. Situations are complicated. Studying them is messy. And while the idea of a social theory of everything might be appealing to some, the pace of change in the world is such that trying to find one grand unifying theory of social life together on (and off) the planet has become a fool's errand. Theorizing not only must suffice, but this work is also "never done" (CLARKE et al., 2018, pp.56, 349). Just as users of situational analysis seek theorization rather than formal theory, they do not regard the theory of others as sacrosanct. Even long-established theory becomes a much more productive thinking tool when its concepts are treated, with Herbert BLUMER, as "sensitizing concepts" which can inform and inspire inquiry, but not dictate the findings (1969, p.147; cited also in CLARKE et al., 2018, especially pp.16, 310). Employing theory in terms of definitive concepts may help a researcher get the shape of something they're thinking about, but it is rarely analytically productive or abductively stimulating. Interrogating theory, rather than simply invoking it, should be the aim (BARBOUR, personal communication, April 19, 2019), and researchers should not be compelled to accept received theory as a framework for their inquiry. [28]

Students and researchers who wish to approach a question using qualitative methods, but without a background in QSR methods and theory need to be able to press the reset button on some of their former core, but likely tacit, assumptions. To accomplish this, I propose two main interventions. Firstly, they need a crash course in the philosophy of science. They must be introduced to a way of understanding their old and new fields of study and work, including their respective approaches to producing knowledge, in relation to each other. This can facilitate a deeper appreciation of the methods used and an awareness of the tacit use of theorizing work. Learning first to recognize, and then to compare and contrast different types of questions and the different tools for their exploration, can expand understanding of and respect for different ways of knowing. In this way, students learn not only to match the questions and the methods, but also to

critically evaluate all the research that they read. Ideally, all students—regardless of study program—should participate in this type of coursework, at the latest as part of the general university education. This would, however, in many cases necessitate institutional changes, the grappling with which lies outside the scope of this paper. For now, I must content myself with an appeal for a first step as outlined above. [29]

Secondly, instruction in research methods should be designed in a way which incorporates this perspective and which teaches explicitly not only the tools, but also the theoretical justifications for their use. This would have the effect of helping students and researchers understand different ways of knowing as tools in a well-stocked toolbox, complementary rather than competitive (MOSES & KNUTSEN, 2019 [2007]). Challenging the privileging of one way of knowing over another could in turn help to dismantle hegemonic structures in science and provide a further democratizing impulse to knowledge production in higher education and beyond. We need the knowledge, and the experience, and the insight, and the potential that these practitioners bring with them when, in the course of their careers, they find themselves asking questions of sociological import. [30]

In many fields, a lack of attention to theory, or the answer to *why we do what we do*, does not necessarily pose any particular problems in daily work. But wherever methods travel across disciplinary boundaries, it is necessary to articulate more explicitly the justification for the use of a particular technique to create knowledge about something. This justification is precisely what in many cases has failed to happen, which CLARKE et al. (2018, p.24; see also CLARKE & KELLER, 2014) lamented when they wrote about the "shearing off" of key points of the epistemological underpinnings of grounded theory methodology when the method traveled "to new sites of application." They continued:

"For example, qualitative research recently gained legitimacy and funding, which led to 'quickie qual courses' for quantitative investigators to expand their research repertoires for mixed-methods projects. Many such projects ignore the philosophical grounding and epistemology of the methods. Thus they do not seriously engage qualitative methodologies as epistemologies with built-in assumptions about the world and social life" (ibid.). [31]

What happened, then, was that qualitative techniques were ripped from their theoretical foundations and applied recipe-style to piles of extant data. The result of this was qualitative research based on whatever theoretical premises were dominant in the field from which the researcher came, whether these ever had been made explicit or not.¹¹ In the areas with which I have most experience, this manifests itself as a belief in an objectivist, proceduralist data-processing-as-

11 Many authors in psychology and the health sciences have problematized this. Among them, Virginia BRAUN and Victoria CLARKE (2021) wrote about this in terms of *Big Q and little q*, Clive SEALE (1999) picked apart the goodness question and (2002) suggested methodological awareness as an antidote to the problem of methodologically vapid research, and David SILVERMAN (2013) questioned whether naïve qualitative inquiry without the actual work of analysis really counts as research.

analysis approach with an allergy to "overinterpretation," and which I have seen lead to article drafts which, in the worst case, amount to little more than regurgitative descriptions of more-or-less "raw" interview data. It is hopeless to expect that qualitative research undertaken under such conditions will succeed in fulfilling its theorizing potential.¹² I argue, with Stefan TIMMERMANS and Iddo TAVORY (2022), that engaging in qualitative research, in whatever constellation it takes place, will be most fruitful when researchers engage with theory. They stressed that "the theoretical contribution of qualitative research is the endeavor's protection against irrelevance" (p.6). My plea is therefore to make an explicit awareness of and facility with theory an integral part of methods instruction wherever qualitative methods are being used. [32]

4.2 Relentlessly reflexive

When I made the move from the world of medical research, where widespread use of the passive voice was still meant to signal distance to data and supposed objectivity, to QSR, it was not a move from objective to subjective (read biased), as I had expected. Rather, the issue of the researcher's fingerprints on the research was still very much a matter of degree, and the big discussion was still *how much I* should be in the texts that represented the results of my work. As far as I could then understand, it was more a question of style than of reflexivity; the great sins were still bias and opining, and the aim was still irreproachability. From this point it is a short leap back to the safety of facts and reproducibility and "right answers." [33]

In fact, the desperate attempt to avoid subjectivity and bias is a failure to recognize and reflexively engage with the presence of the researcher in their situation of inquiry. In developing situational analysis, CLARKE remedied this methodologically through explicitly and unapologetically positioning the researcher *in the situation* and *on the map* and invited them to reflect not only on their current relationship to the situation and the elements in it but also on how they affect one another. On this point, CLARKE et al. (2018, p.128) wrote that "by doing research on this situation, you become part of it. You will influence it, and your participation may well affect you." As I suggest above, researchers may benefit from exploring issues of reflexivity using relational mapping. I restate that carrying out this exercise can require a good deal of courage, but that it can be very rewarding if one sticks with it and returns to it when needed. [34]

12 As mentioned above, TIMMERMANS and TAVORY (2022) rightly pointed out that not all qualitative inquiry is undertaken with the goal (or the funding) of pushing the development of sociological theory. There must also be room in academia for studies with other purposes. At the same time, we do a disservice to researchers from the professions, to the field of study, and especially to participants, who make themselves vulnerable to us in a belief that they are contributing to science, when we fail to address in our systems of higher education the issues central to this text.

4.3 On feeling unsettlingly unsettled

One of the themes central to inquiry employing situational analysis will be a sometimes-uncomfortable openness. This openness manifests itself in many ways. I will address two here. The first is the insistence built in to situational analysis on "err[ing] on the side of inclusivity" (p.130) when making situational maps, which is key to maintaining complexity. At first this can be a challenging balance to strike, especially when trying to communicate to others—institutions, ethical review boards, funding bodies, supervisors, and colleagues—what is part of the project and what is not. One of my beleaguered dissertation supervisors pleaded with me more than once to set the boundaries of my project. As a person who seems to "find order comforting," the observation that "where your situation begins and ends remains an empirical question *throughout* your research trajectory" and the urging to "resist the impulse to attempt to define the boundaries of your situation, especially in the early stage of a project" (p.118, emphasis added) would hardly have comforted my supervisor on this point. The authors stressed further:

"Learning to tolerate ambiguity and to work with elastic concepts is very valuable in becoming a qualitative analyst—using any interpretive method. We often need to dwell in gray areas, sometimes uncomfortably. But the analytic payoffs of doing so can make it truly worthwhile" (ibid.). [35]

My other—also beleaguered—supervisor was fond of drawing an analogy between research and getting to know a new place; it can be helpful to first climb the hill just above the city, take a wide view, get your bearings, and identify some things which pique your curiosity, before climbing back down, seeking out those interesting spots, and spending some time there. Both pieces of advice are valuable: On the first point, being able to make decisions about what deserves focus (right now vs. maybe later) is an important skill and one crucial to driving the research process forward (read getting done!). The second point is strikingly compatible with the approach taken in situational analysis. Both can be facilitated by situational mapping, but then rather in terms of getting an overview and then zooming in rather than in terms of excluding. Changing my focus from exclusion to *focusing* or *zooming in* was reassuring; it meant I no longer had to worry that I was disregarding something that would have turned out to be important, had I only been able to see it (on the map and/or recognize it as such). As the researcher gets to know the situation better, elements are both added and removed based on whether they are relevant empirically, and focus is chosen based on what seems surprising or promising to pursue (right now). [36]

The willingness to stay with the mess of inclusivity even when it feels unsettling brings us to the second aspect of openness, the "ongoing conundrum" of "prematurely terminating the analysis" when the research seems to fit a given piece of received theory (CLARKE et al., 2018, p.122). Instead of excitedly "finding" that one's research is *an instance of X*, they advised researchers to "[use] extant concepts as tentative and sensitizing research tools" rather than

definitive concepts and "keep on analyzing" (ibid.). On this point, CLARKE and her co-authors wrote directly to researchers like me:

"Resisting premature analytic closure is crucial [...]. Especially for those initially learning qualitative inquiry, [...] actually doing analysis provokes anxieties and insecurities. This is normal. People who come to qualitative inquiry with strong quantitative backgrounds are often taken aback by the assumptions of ultimate indeterminacy that undergird qualitative analysis. This can take some getting used to. People new to qualitative analysis often lack confidence in their capacities to do it, and may prematurely terminate the analysis as a result" (ibid.). [37]

In my experience, the insecurities which accompany inexperience can lead to analytic paralysis as easily as to premature analytic closure. In both cases, I cannot stress enough that participation in working groups is the key to getting out of these ruts. One of the trickiest things for me to learn was when I could say I had *found* something, and it was time to transition to writing things up. Learning what abductive surprise feels like is exhilarating, but it was for me also one of the great mysteries of learning QSR. Working groups can be an ideal place to learn the art of interpretation. For those who tend to come to a quick conclusion in order to avoid the discomfort of staying with the analysis, working groups can put more eyes on the data, deconstructing it and challenging both early interpretations and notions of "'right' and 'wrong' readings" (CLARKE et al., 2018, p.27; see also STRAUSS, 1987; TAVORY & TIMMERMANS, 2014). As the analysis progresses, they can also push the analyst on questions of fit, plausibility, and relevance (TAVORY & TIMMERMANS, 2014). This profoundly interactionist approach also provides a low-threshold forum for testing out interpretations and gaining experience, confidence, and maturity in what can initially feel like a very foreign approach to data analysis for many newcomers. [38]

4.4 Teaching and learning

Part of situational analysis' symbolic interactionist roots and its return to the social is the recognition that learning and teaching are two sides of the same coin. CLARKE inherited this at least in part from having learned grounded theory methodology from one of its pioneers. The practice of theorizing in small working groups is present in "The Discovery of Grounded Theory" (GLASER & STRAUSS, 2012 [1967]), but communicated rather implicitly when compared with the central way working groups would feature in STRAUSS' (1987) "Qualitative Analysis for Social Scientists" two decades later. In this volume, STRAUSS' own working groups with students and colleagues and their data took center stage as he gave us his roadmap for teaching and learning QSR. Adele CLARKE, Susan Leigh STAR, Kathy CHARMAZ, Roberta LESSOR, Fritz SCHÜTZE, and Gerhard RIEMANN are among the many researchers on both sides of the Atlantic who have carried on this tradition with new generations of students and colleagues. Groups with and without formal leaders can serve different purposes at different points in the learning process. Very new learners will often benefit from being in a group which includes a more experienced analyst and "skilled listener," someone who can patiently and playfully "[listen] forth [...] a new analytic story—a new

coherence" from the data they have brought to the group, helping new analysts to break through the "terror" of learning grounded theorizing while remaining non-directive and helping them to "find their own paths" (CLARKE & STAR, 1998, pp.342f.) as STRAUSS (1987, especially Chapters 2 and 4) did in his time. [39]

When analysts have begun to find their footing, however, participating (perhaps also) in working groups consisting of peers who have very roughly the same levels of experience and of formal qualification (though the latter point need not always be relevant—perhaps more significant is a similar level of experience with the method) can be a great benefit. In such settings, the dynamics are different. The threshold for trying out an idea is lower. There is nobody to impress, just suggestions for interpretations with no lasting consequences. Practicing interpretation in a group on another researcher's data is instructive on several levels. For the researcher who brings the data, the group has a role in the deconstructive approach which features heavily in situational analysis, generating multiple possible interpretations and "often rupturing taken-for-granted assumptions" (CLARKE et al., 2018, p.27) which can take hold, partially due to the researcher's nearness to their own data. Likewise, it can lend support to tentative points of analysis to see that peers share one's interpretation. For group members, the "bang[ing] into and bounc[ing] off of the interpretations of others" (ibid.) is no less valuable. Hazarding guesses, hearing those of others, being exposed to different explanations and to the fund of information of one's peers is deeply pedagogical. [40]

In considering how to increase the use of working groups, I would remark that institutional wheels tend to turn slowly, but that occasionally something that they run over gets stuck in the tread and picked up. It is therefore an advantage, during periods of revision of study plans and openness to change, that good examples of things that work are already close at hand. In the meantime, students and researchers benefit from the working groups one way or the other. Thus, whatever the way in which instruction is arranged on a formal level at a particular institution, I would earnestly encourage instructors and students alike to take initiative to such group learning. While it is true that part of doctoral candidates' work is to develop initiative and learn to figure out how to figure things out, by failing to regard methods learning as more of an apprenticeship and a truly social and interactionist endeavor in the STRAUSSian tradition (CLARKE & STAR, 1998; CLARKE et al., 2018; STRAUSS, 1987), we waste a lot of time and squander a lot of ambition. [41]

5. Concluding Remarks ... For Now

In this essay, I have, with a starting point in my own experience, laid out some of the challenges associated with creating relevant, valuable new sociological knowledge when there is a fundamental mismatch between the theoretical assumptions—tacit though they may be—which analysts bring with them from their professions and the methods choices they make when they embark upon research questions for which a qualitative approach is appropriate. I have made the case for the particular benefits situational analysis offers in such a scenario, and argued that teaching and learning this method and the theoretical foundations upon which it is based, in combination with employing working groups, can facilitate the production of relevant new knowledge even by those new to sociological thought. I have further argued that making space in academia and in our minds for these newcomers is essential to working through the complex questions facing us now and in the future. [42]

I would not hesitate to characterize my journey from medicine into QSR as an odyssey. Certainly, I brought my share of biography and intersectionality and tacit assumptions with me, and, for a time, was positively recalcitrant in my own positivism! Looking back, I would not trade away what I have learned in exchange for a shorter path, but I do see a value in facilitating a quicker way for those whose journey is starting now. I appeal to those responsible for the organization of instruction in qualitative methods to consider the arguments I have made in light of the situations at their institutions. I encourage academic supervisors and students to take the initiative and reap the benefits of teaching and learning qualitative methods in small working group settings. [43]

Finally, I would like once again to emphasize the transformative potential of situational analysis' feminist, antiracist, decolonizing, democratizing philosophies: The theory/methods package of situational analysis is explicitly open and accessible to researchers and questions and ways of knowing which historically have been systematically silenced. The judgments of *rightness* and *goodness* which academia saw fit to bestow or withhold based on criteria that served itself best are passé. Rather, researchers must look to the pragmatist value of usefulness, and focus on producing and promoting valuable, relevant new knowledge. If this means researchers must challenge their own ideas of what good science is and learn new qualitative languages, so much the better. Situational analysis can be a contribution in that regard and lift qualitative social inquiry: One of the functions of its foundational philosophies is the dismantling of high thresholds for participation in the social-scientific conversation. Its pioneers demonstrate an intellectual generosity which builds up new researchers and tears down ideas of discipline-based hegemony and uncritical hierarchical veneration. If ever there were a time in the world when we needed such a philosophical orientation to knowledge production, that time is now. [44]

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