

Beyond Inductive Thematic Analysis: Practical Qualitative Methods for Richer, Policy-Relevant Insights for Population Health

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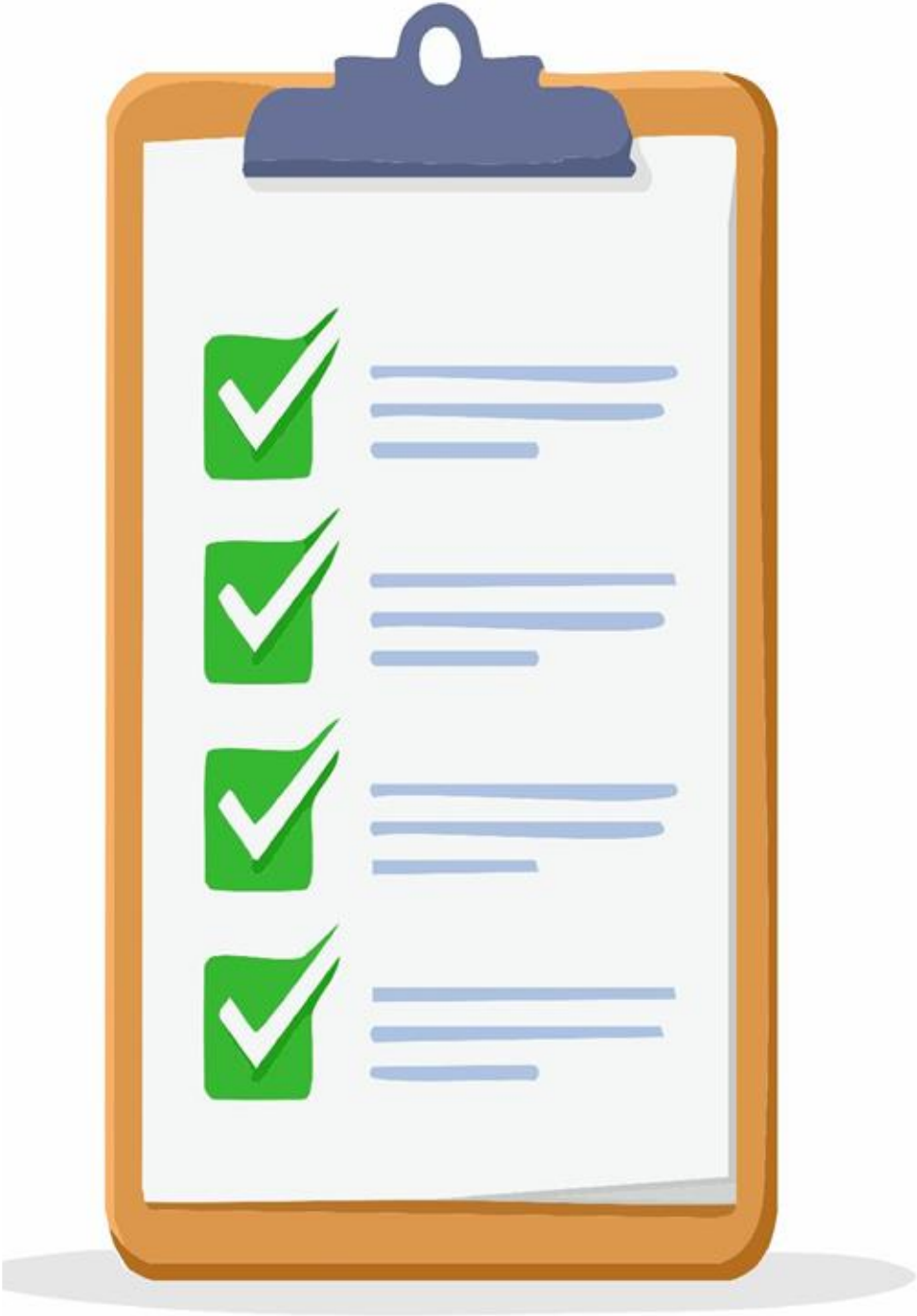


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Washington



Agenda

<u>Topic</u>	<u>Time</u>
Introduction to Methods & ERPOs	1:00pm – 1:30pm
BREAKOUT 1 – REVIEWING MATERIALS	1:30pm – 1:55pm
<i>Break</i>	<i>1:55pm – 2:05pm</i>
Breakout 1 Debrief	2:05pm – 2:30pm
Methods Deeper Dive	2:30pm – 3:15pm
<i>Break</i>	<i>3:15pm – 3:25pm</i>
BREAKOUT 2 – PRACTICING METHODS-SPECIFIC SKILLS	3:25pm – 4:05pm
Breakout 2 Debrief	4:05pm – 4:20pm
<i>Break</i>	<i>4:20pm – 4:30pm</i>
Finished Product Examples	4:30pm – 4:40pm
BREAKOUT 3 – ENVISIONING NEW APPLICATIONS	4:40pm – 4:50pm
Debrief & Closing Thoughts	4:50pm – 5:00pm



Advanced Qualitative Methods – Why?

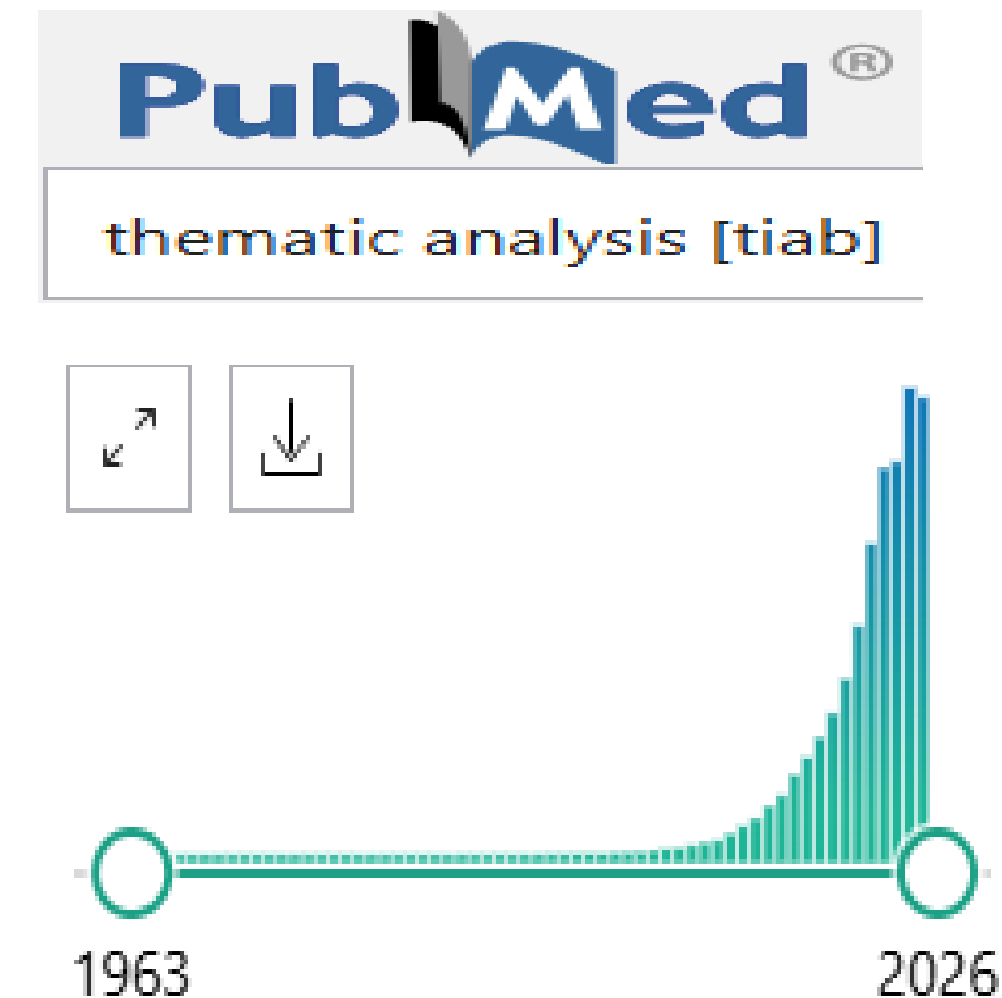
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Why Thematic Analysis is Our Bread and Butter

A Brief History

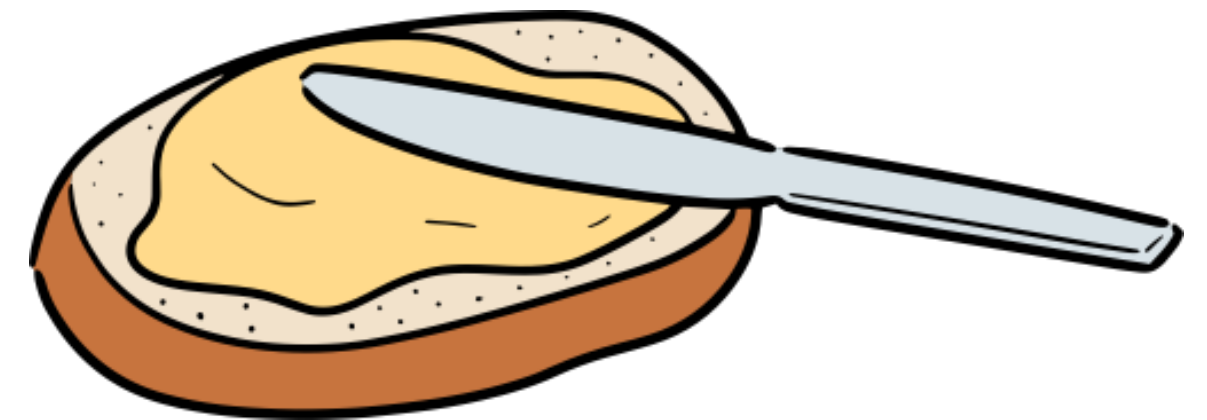


- **1970s-1980s:** Emerged from psychology and social sciences as researchers sought systematic ways to analyze interview data.
- **2006:** Braun & Clarke formalized Thematic Analysis (TA) as a distinct method with clear steps (familiar “six-phase” model).
- **2010s:** Rapid uptake across health, policy, and social research—especially in mixed-methods studies.
- **Today:** The default qualitative approach in many journals and grant proposals.



Why Thematic Analysis is Our Bread and Butter

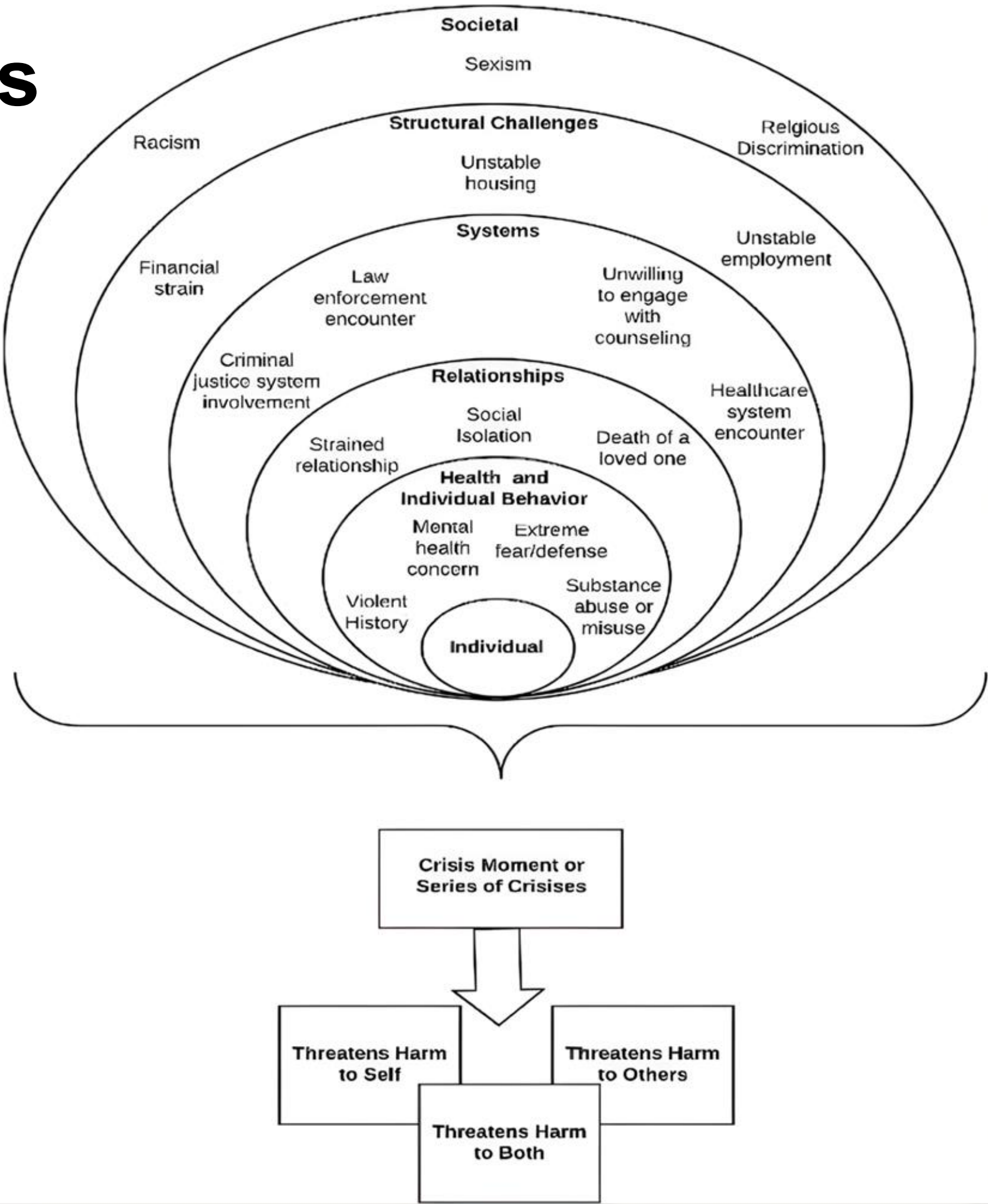
- Clear, teachable, and fits short project timelines
- Flexible across epistemologies and disciplines
- Easy to communicate to reviewers and interdisciplinary teams



An Example of Thematic Analysis

Understanding the Process, Context, and Characteristics of Extreme Risk Protection Orders: A Statewide Study

Rooney L, Conrick KM, Bellenger MA, Moore M, Haviland MJ, Gause E, ... & Rowhani-Rahbar A. (2021). Understanding the process, context, and characteristics of extreme risk protection orders: a statewide study. *Journal of health care for the poor and underserved*, 32(4), 2125-2142.



Why Bread and Butter isn't Always Enough

Thematic Analysis is great for...

- Summarizing what people say and think
- Describing patterns and experiences (phenomenology)
- Exploring new or under-researched areas

But it can fall short when we need to know...

- *How* systems, actors, and contexts interact
- *Why* certain outcomes or patterns emerge
- *What to do* with findings in policy or practice
- How to translate findings into action *quickly*



Learning Objectives



1. **Describe** the limitations of thematic analysis in population health research and practice.
2. **Explain** the advantages of 3 alternative methods for specific policy, implementation, or system-level analytic interests.
3. **Apply** a core skill of one covered method to a question of population health significance.

Three Approaches



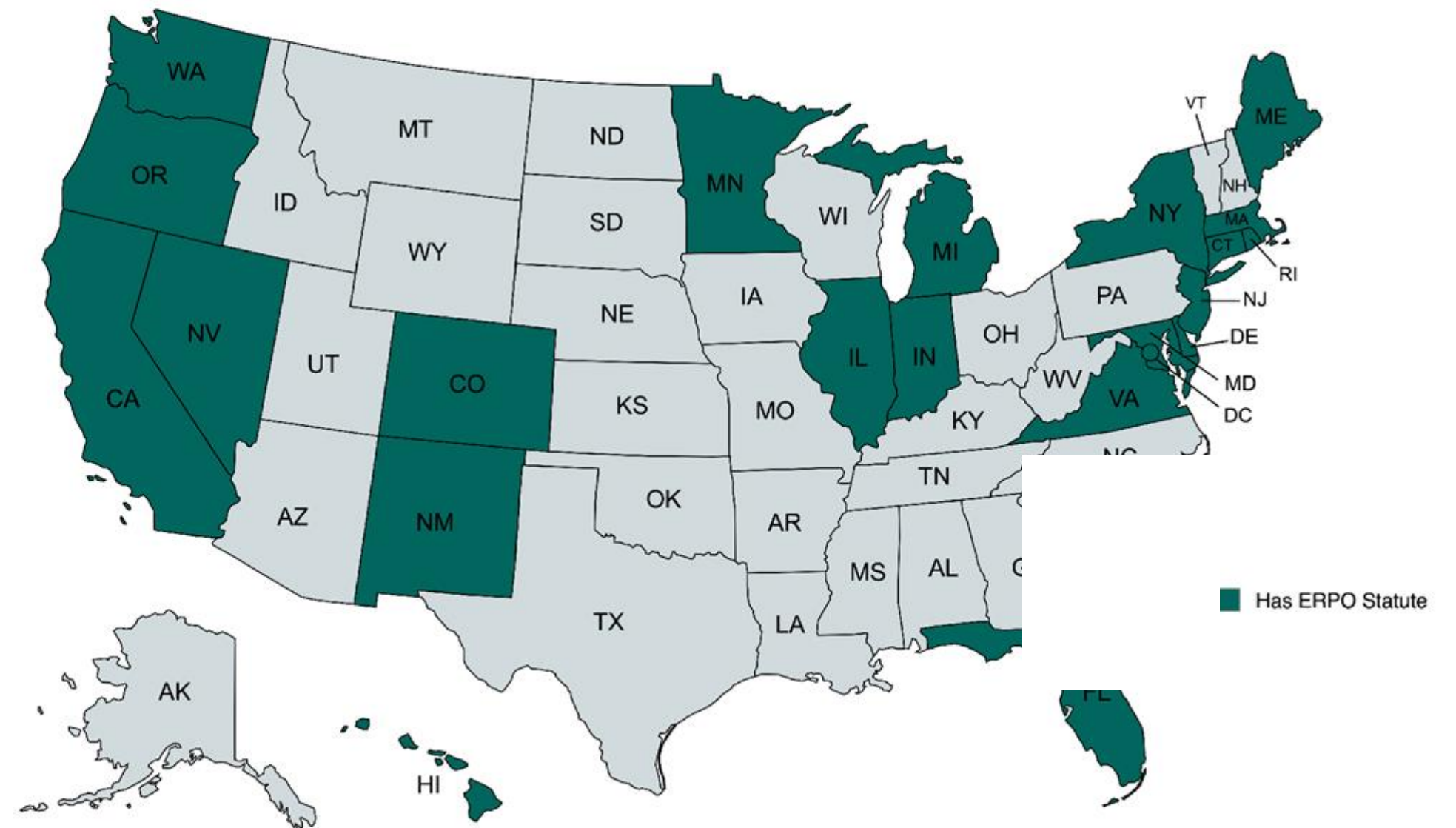
- 1. Situational analysis:** Identify actors, systems, and discourses shaping complex issues
- 2. Pen portraits:** Case-based synthesis to reorganize and analyze data in context-rich ways to support within- and cross-case understanding
- 3. Rapid Qualitative Analysis:** Efficiently summarize findings and translate data into actionable insights in applied and time-sensitive ways

Brief Intro to ERP

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Extreme Risk Protection Orders (ERPOs)

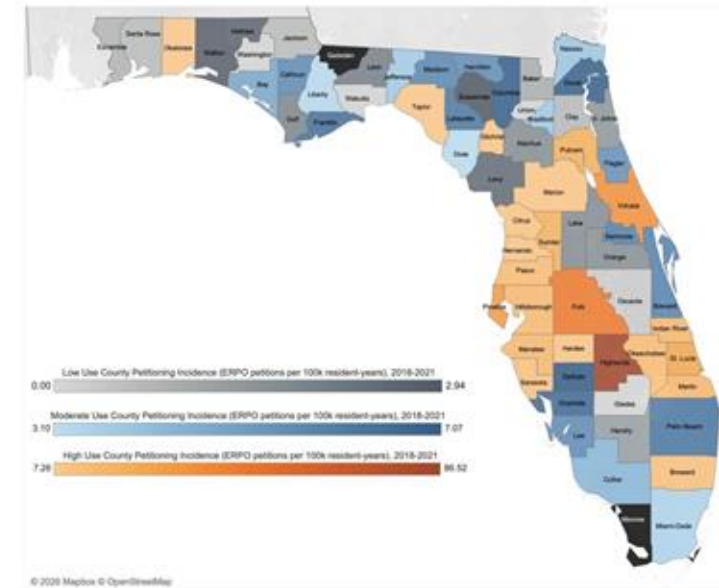
- Civil order to prevent harm to self and/or others
- Temporarily (usually 1 year) restrict firearm access
 - Relinquish current firearms
 - Cannot buy firearms
 - **Specified in statute:**
 - Authorized petitioners
 - Eligible indications of risk
 - Court processes
 - Order enforcement



Extreme Risk Protection Orders (ERPOs)



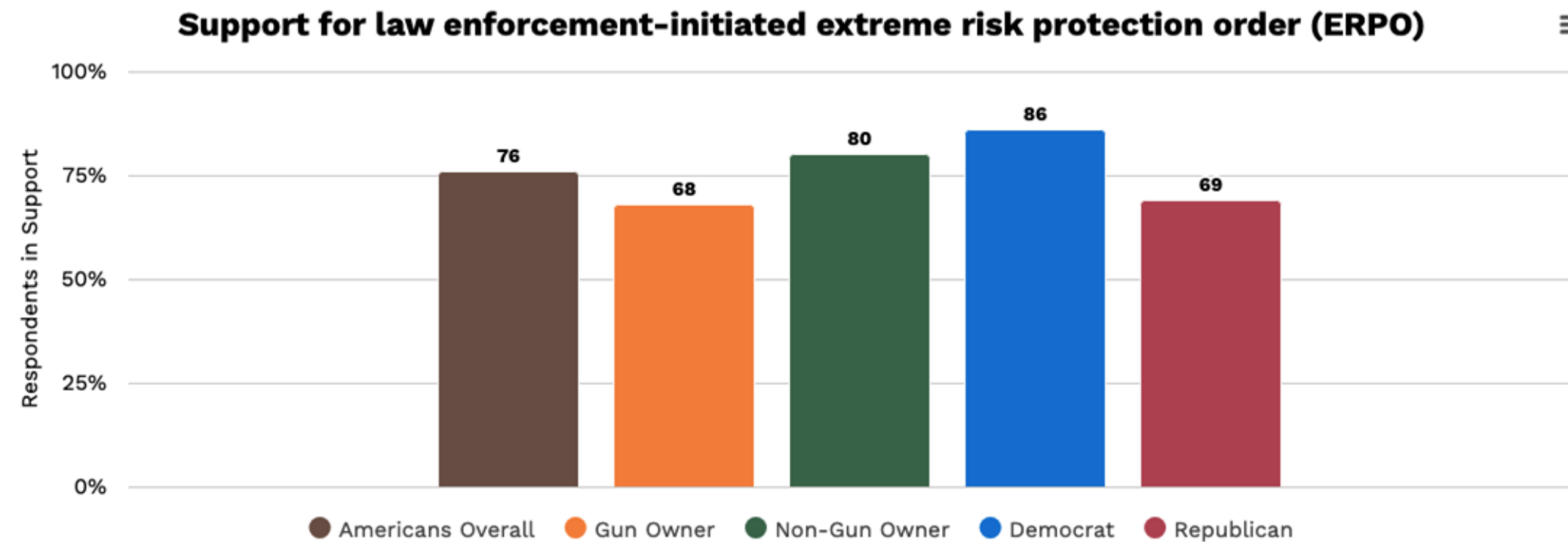
Pallin et al.
(2020)



Ward et al. (2026)



Rowhani-Rahbar et al. (2020)



Center for Gun Violence Solutions
(2025)

Extreme Risk Protection Orders (ERPOs)

ERPO Terms

- “Respondent” = The person who is subject to an ERPO
- “Petitioner” = The person/entity who initiates an ERPO

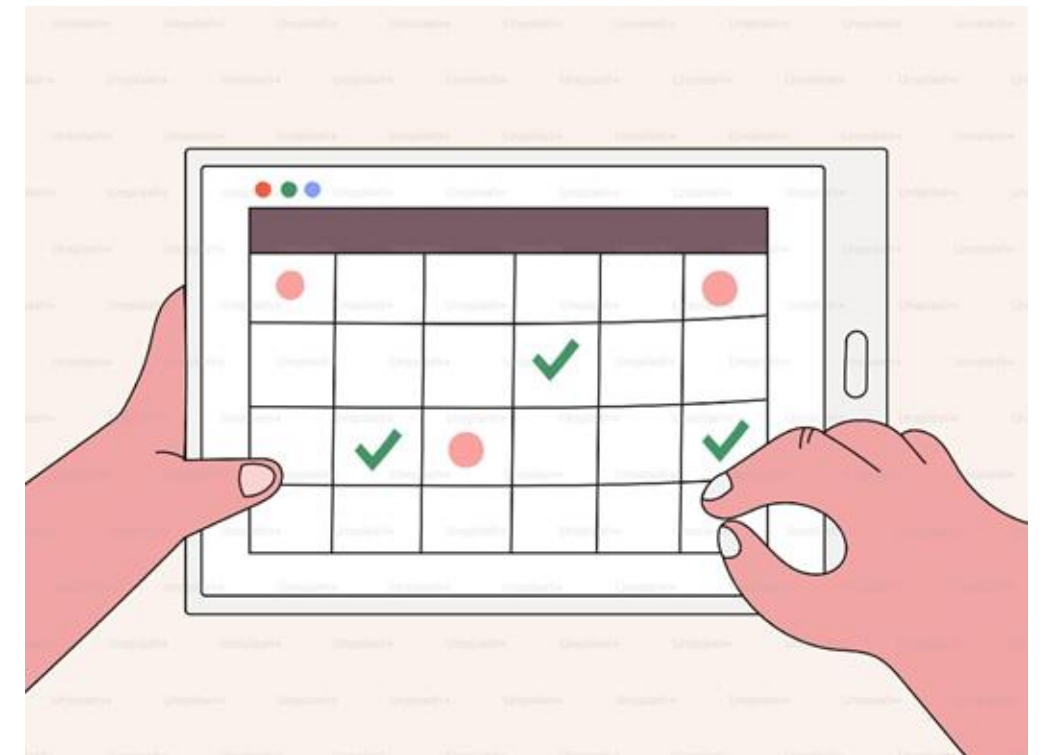
Precipitating event

Temporary *ex parte* order

- Short-duration, temporary order
- Typically executed within a day of filing

Final order

- Also time-limited but longer-duration (often ~ 1 year)
- Court hearing required



Three Approaches

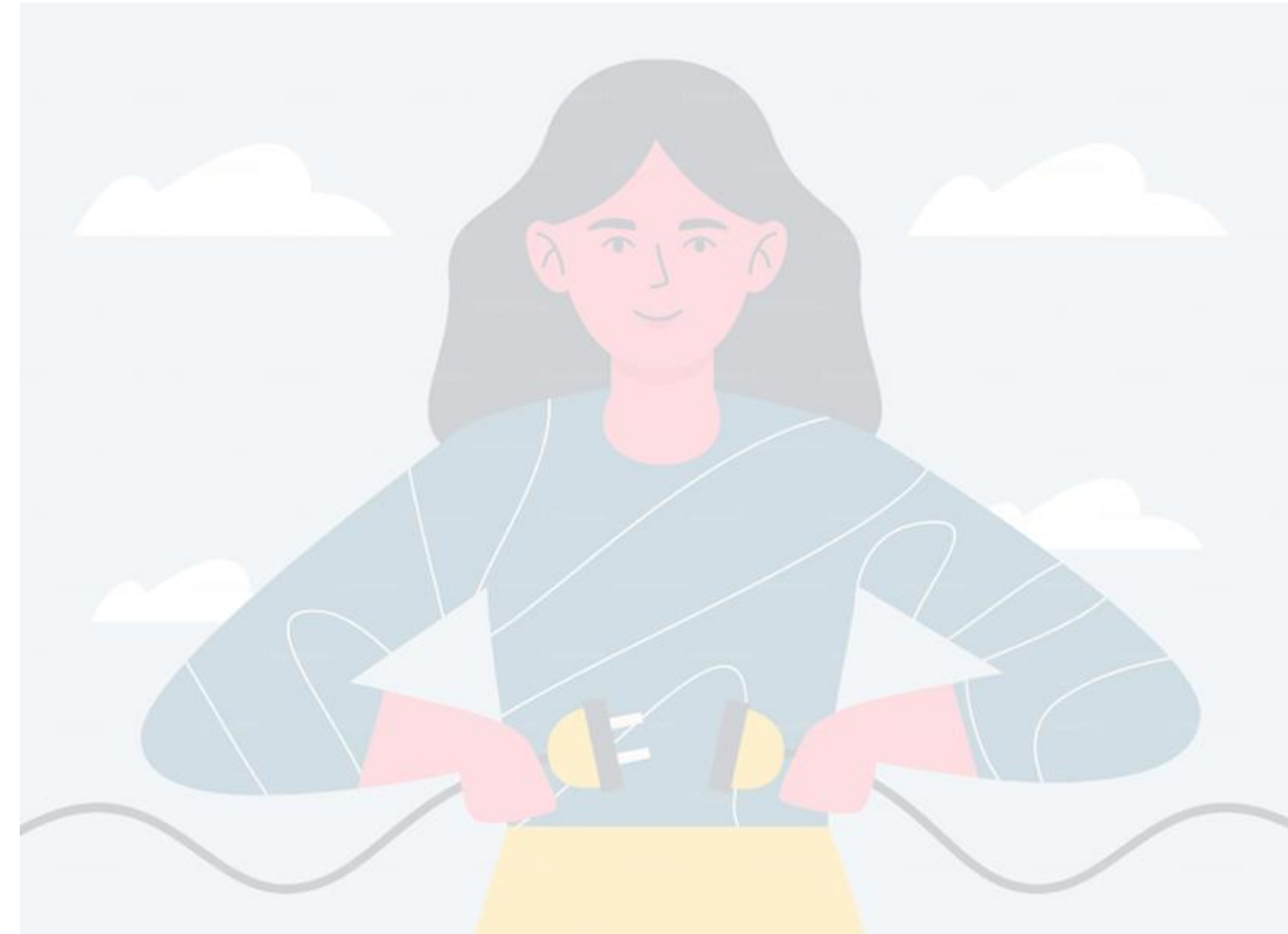


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- 2. Pen portraits:** Case-based synthesis to reorganize and analyze data in context-rich ways to support within- and cross-case understanding
- 3. Rapid Qualitative Analysis:** Efficiently summarize findings and translate data into actionable insights in applied and time-sensitive ways

BREAKOUT

Agenda

1. Identify method of interest
2. Group member introductions
3. Review data source materials
4. Prepare short response to debrief questions (5-7min):
 - Briefly describe your impressions of your qualitative data source.
 - Any clarifying questions from the materials you reviewed?
 - Were there any stand-out challenges to interpreting your source?
 - What unique insights or research questions could be pursued with this source?



REPORT BACK

Agenda

1. Identify method of interest
2. Group member introductions
3. Review data source materials
4. Prepare short response to debrief questions (5-7min):
 - Briefly describe your impressions of your qualitative data source.
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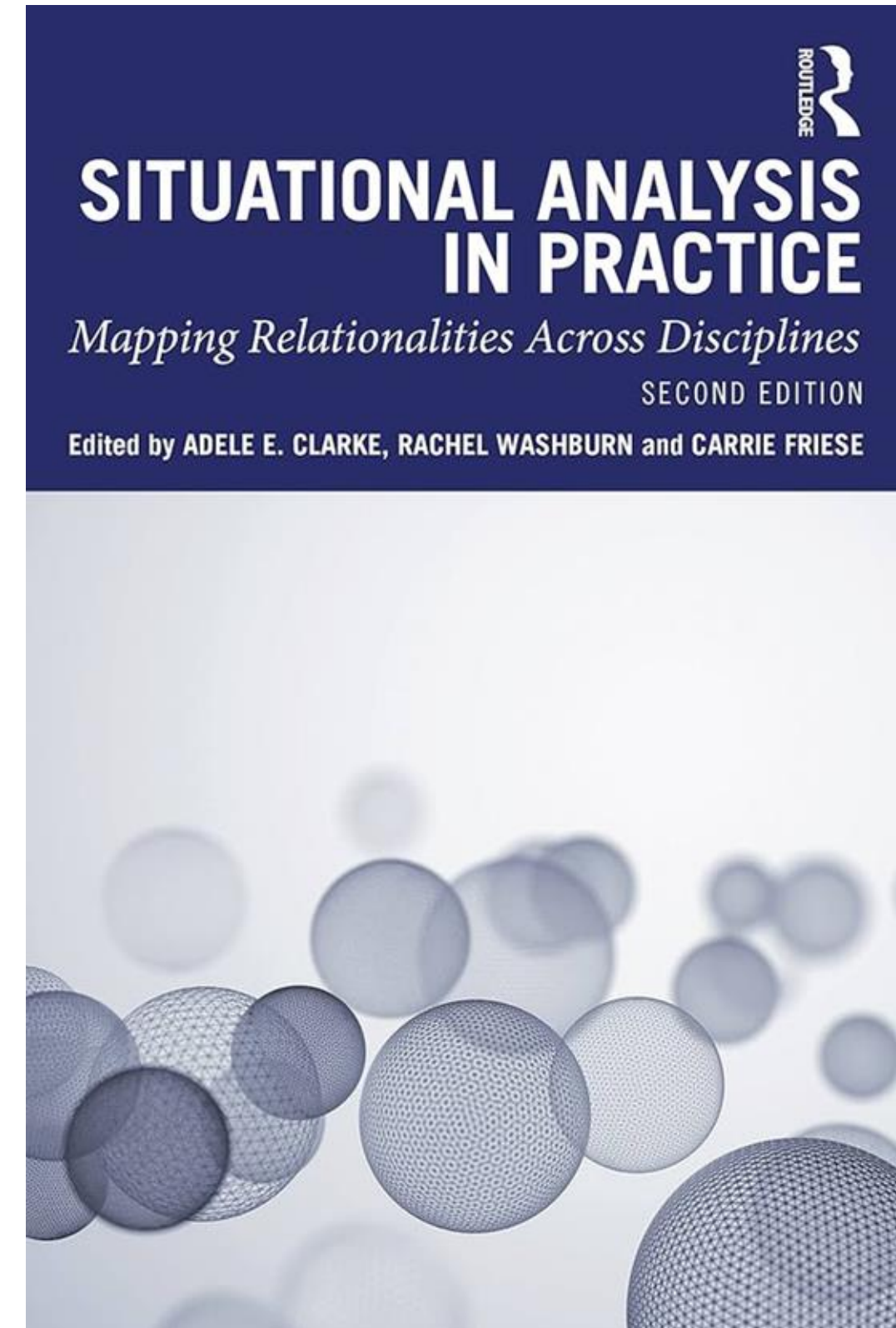
Advanced Qualitative Methods – Diving Deeper

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Situational Analysis

What is Situational Analysis?

- Developed by Adele Clarke (2005) as an extension of grounded theory.
- Responds to postmodern critiques of traditional qualitative methods
- Moves beyond linear coding to capture complex social worlds and relationships.
- Focuses on mapping the situation rather than only coding for categories.
- Emphasizes positionality, power, and relations among human and non-human actors.



Three Types of Analytic Maps

- **Situational Map:** Lists and maps all the key elements in a situation
 - e.g., people, institutions, discourses, policies, technologies
- **Positional Map:** Displays key positions or discourses on major issues
 - e.g., competing views on “public safety” or “mental health risk”
- **Social Worlds/Arenas Map:** Shows collective actors and their arenas of action
 - e.g., health providers, law enforcement, policymakers



Three Types of Analytic Maps

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INDIVIDUAL HUMAN ELEMENTS/ACTORS

Nurses (RNs) and nursing aides (LVNs)
Patients and patients' families and friends
Physicians
Hospital managers/administrators/
consultants
Home health aides

COLLECTIVE HUMAN ELEMENTS/ACTORS

Nurses', physicians', and others' professional organizations
Hospitals, chains, and hospital associations
HMOs, state and private insurers
Pharmaceutical and medical supply companies

DISCURSIVE CONSTRUCTIONS OF INDIVIDUAL AND/OR COLLECTIVE HUMAN ACTORS

Nurses as caring/angels of mercy/"good mothers" imagery
Patients as needy, demanding
"Everybody's so different"/patient uniqueness
Physicians as unavailable
Administrators as manipulative
Management consultants as heartless

POLITICAL/ECONOMIC ELEMENTS

Rising costs of hospitalization
Expansion of outpatient services
Limits/caps on insurance coverage

TEMPORAL ELEMENTS

Caring as invisible nursing work that takes time
Nursing time per patient and overtime issues
Invisible aspects of caregiving

MAJOR ISSUES/DEBATES (USUALLY CONTESTED)

Nurse/patient ratios as formulas of time per patient
Caring as proper nursing work
Caregiving—(invisible) emotion/caring work
Caregiving—technical/clinical work
Work redesign/restructuring plans

NONHUMAN ELEMENTS ACTANTS

Information technologies
Medical technologies
Pharmaceutical drugs and treatments
Work redesign/restructuring plans
Cost containment and patient/customer satisfaction goals

IMPLICATED/SILENT ACTORS/ACTANTS

Patients
Patients' families and friends

DISCURSIVE CONSTRUCTIONS OF NONHUMAN ACTANTS

Managed care as antipatient, antinursing
Medical technologies as lifesaving and/or dehumanizing

SOCIOCULTURAL/SYMBOLIC ELEMENTS

Caring as important, skilled professional work
Variations of expectations of caregiving and receiving among patients and nurses

SPATIAL ELEMENTS

Distribution of patients on ward/floor
Invisible aspects of caregiving
Hospital design issues

RELATED DISCOURSES (HISTORICAL, NARRATIVE, AND/OR VISUAL)

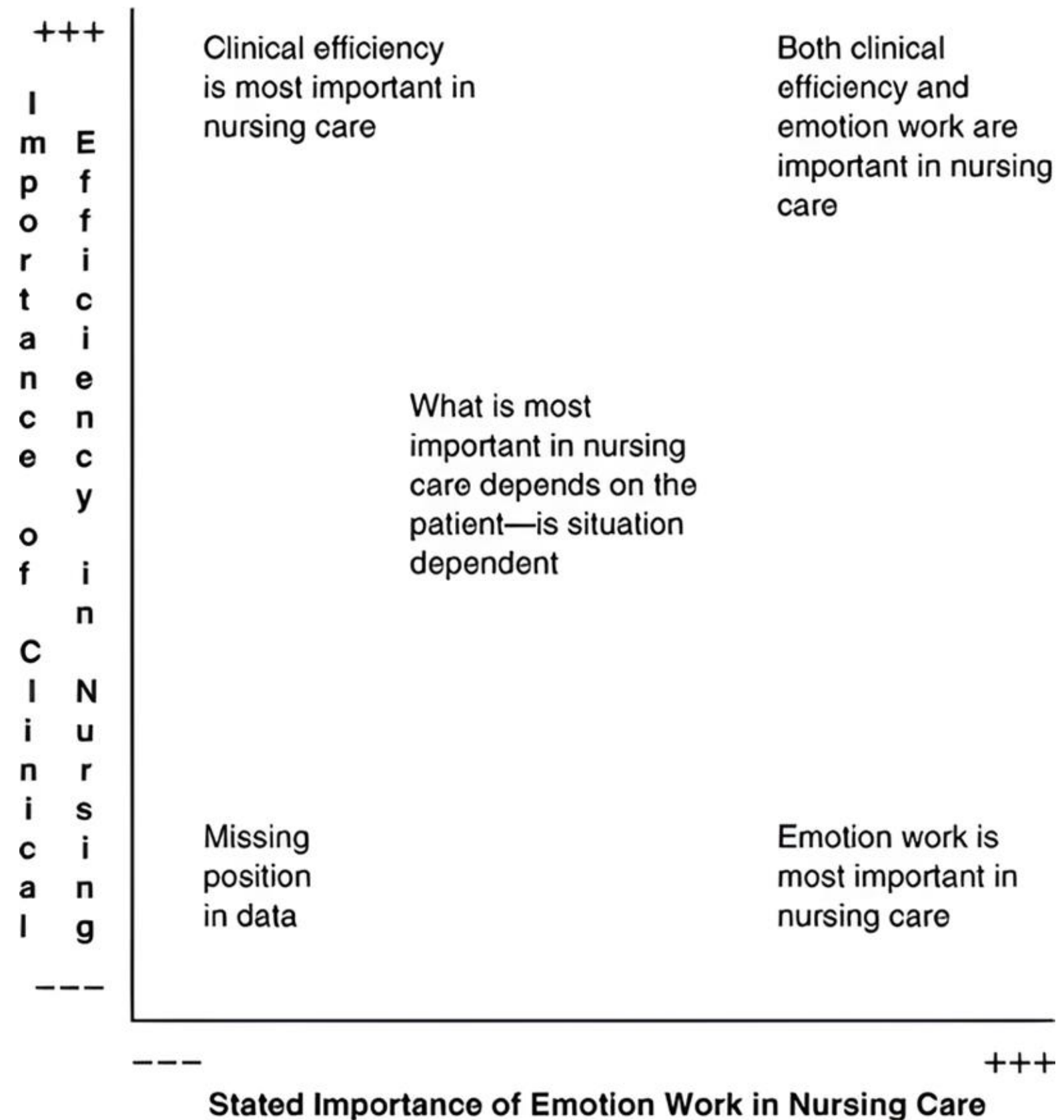
Crisis of American health care

OTHER KEY ELEMENTS

Emotion work
Emotions of patients, nurses, families, others

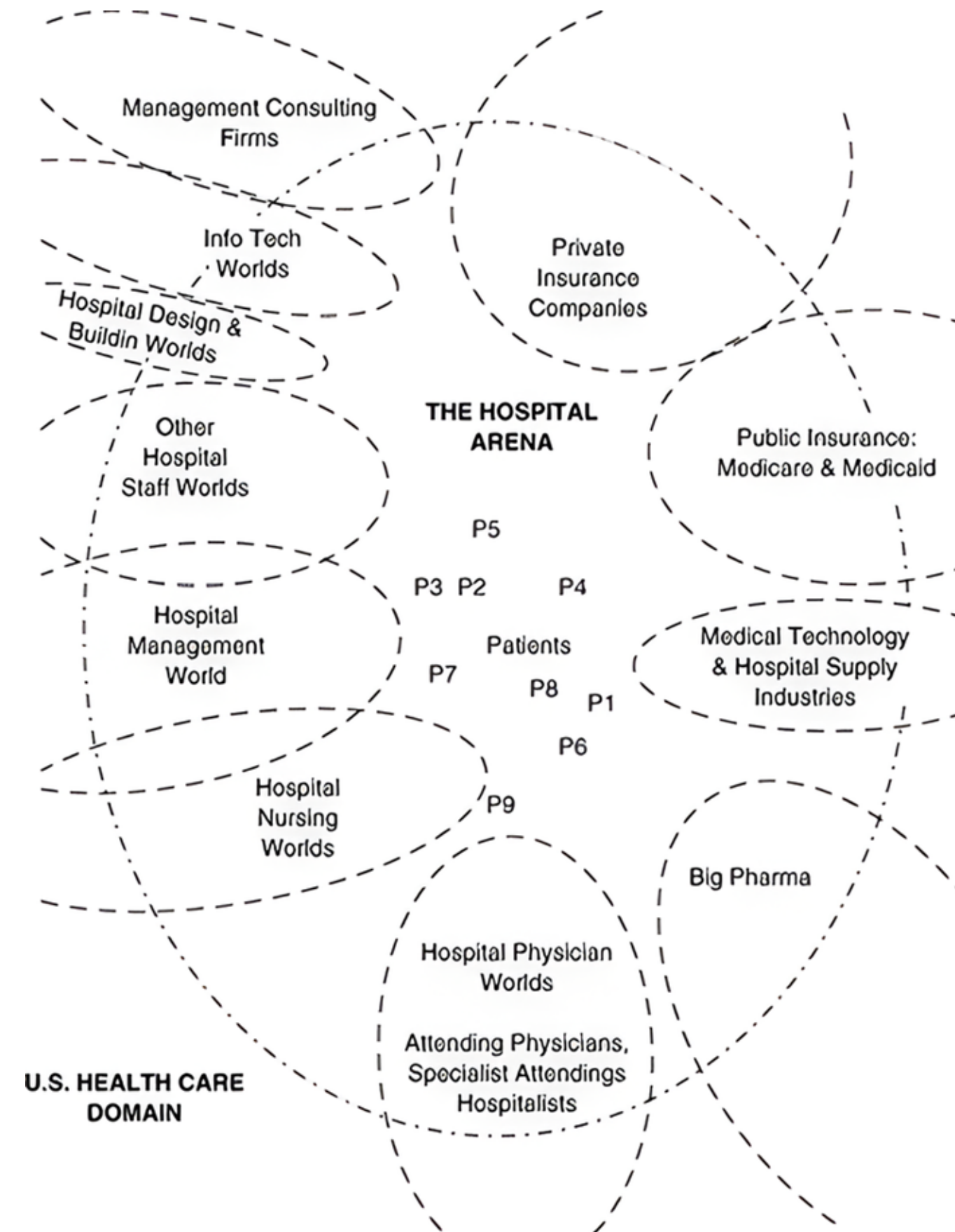
Three Types of Analytic Maps

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Three Types of Analytic Maps

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 - e.g., health providers, law enforcement, policymakers

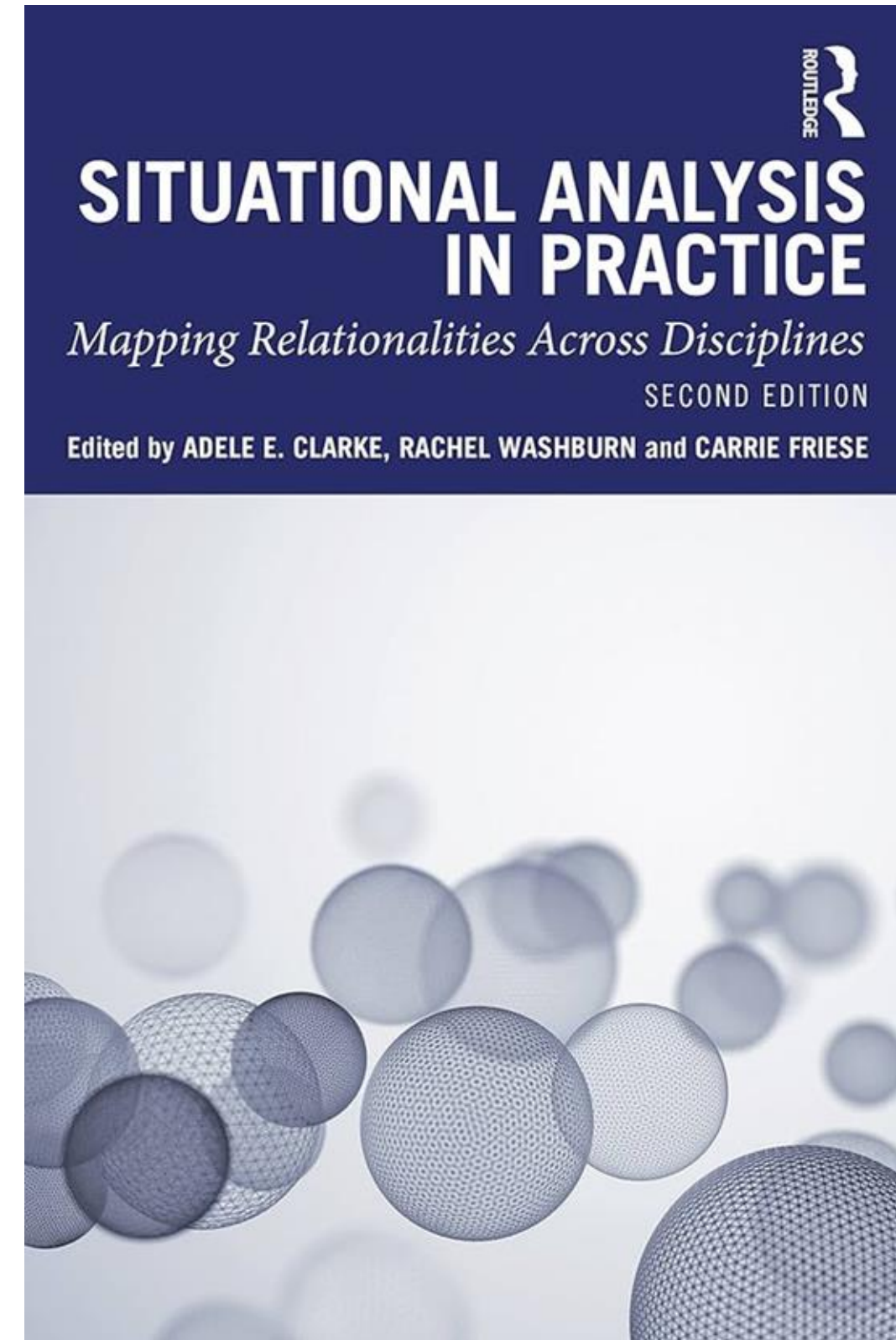


How Situational Analysis Differs from Thematic Coding

Thematic Coding	Situational Analysis
Focuses on categorizing text	Focuses on mapping relationships
Seeks themes or core categories	Explores actors, discourses, and power dynamics
Often linear	Iterative and relational

Why Use Situational Analysis?

- Values complexity, contradiction, and power relations
- Focus shifts from individuals → *the situation*
 - The situation is the unit of analysis
- Captures complexity and context in social phenomena.
- Helps visualize systems of influence.
- Useful for policy research, evaluation, and community-based studies.



Situational Analysis: An Example

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Applied Example

Study:

“Preventing Unintended Consequences: A Mixed Methods Analysis of County-level ERPO Use and Incidence of Injurious Shootings by Police in Florida, 2015-2021”

Objective:

Assess how differences in county context and agency processes related to ERPO petitioning and service may explain variation in ERPO uptake, respondent characteristics, and shooting incidence.

The poster features a dark background with gold and white text. At the top left is the Vanderbilt University logo. The title is in large, bold, gold letters. Below the title, the Principal Investigators (PIs) and Co-Investigator (Co-I) are listed with their names and degrees. The Research Support section lists eight individuals with their circular portraits and names. The bottom right corner features a small Vanderbilt University logo and a page number '1'.

**Preventing Unintended Consequences:
A Mixed-Methods Analysis of County-Level ERPO Use and
Incidence of Injurious Shootings by Police in Florida 2015-2021**

PIs:
Julie A. Ward, PhD, MN, RN, PHNA-BC
Cassandra K. Crifasi, PhD, MPH

Co-I:
April M. Zeoli, PhD, MPH

Research Support:

George Albu, Jolie Shah, Grace Beberta, & Hiyab Berhe
Vanderbilt University

Jacob Guntern
University of Michigan

Jessica Van Tassel, Nandita Somayaji, & Liz Wagner
Johns Hopkins University

An Analytic Shift

Thematic Analysis



Identifying general themes and forces
that shape ERPO use

Situational Analysis



Drawing out nuances to characterize
ERPO implementation in low-,
moderate-, and high-use contexts

Methods: Framing

Pre-Session:

1. Smallest-unit inductive coding (completed with interest in key actors, systems, & discourses in mind)
2. All members establish initial familiarity with materials

Analyses:

“Framing the Analysis” exercises

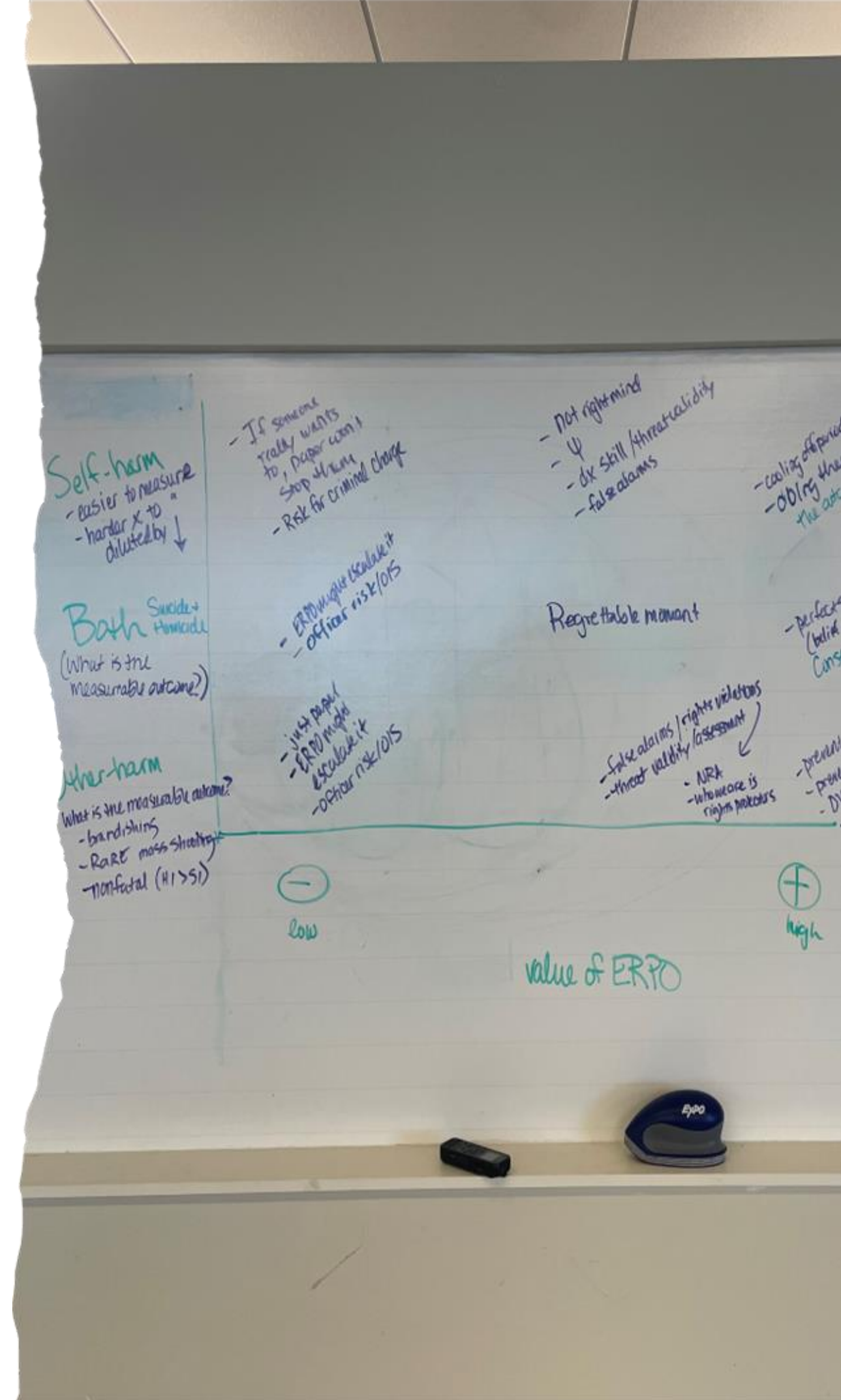
- Create **messy or ordered situational maps**: Identify all the human and non-human things that might matter. Look for what is present and areas of silence.
- **Relational Analysis**: Next, identify and define potential connecting lines to explore and map relationships across the various elements.



Methods: Meaning-Making

Once satisfied with familiarizing exercises, work toward determining what “big stories” could be told:

- **Social Worlds/Arenas Map**
 - People “doing things together”
 - Analysis of social/symbolic interactions and collective actors
- **Positional Map**
 - A deeper dive into some aspect of actions that define the worlds
 - What are the basic issues about which there are different positions?
 - Define axes of interests
 - Plot and define clusters of codes on the matrix





Team Reflections on Situational Analysis

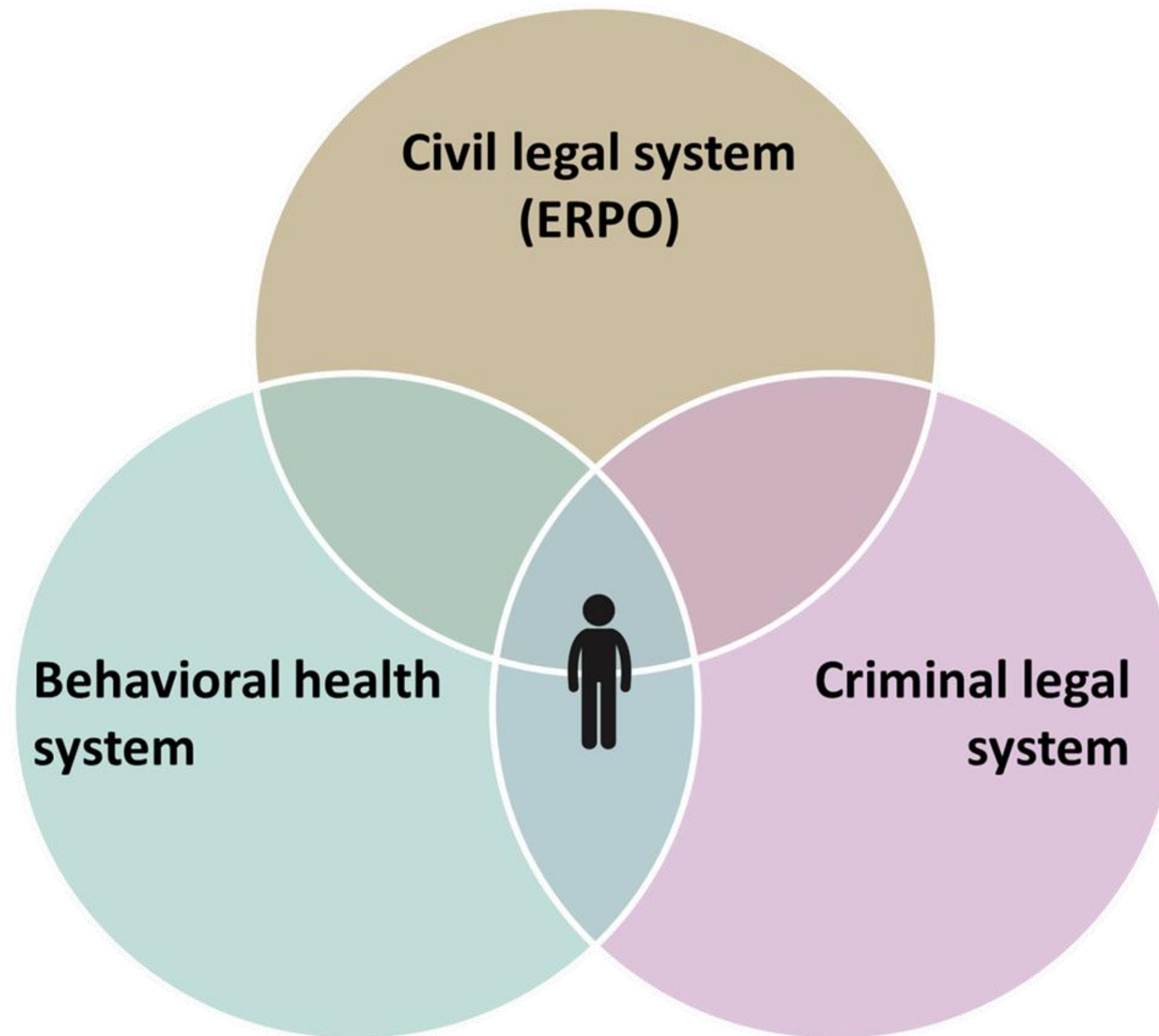
“It felt like a Saturday!”

In-person, physical engagement with content

Leaning-in to differences and tensions to push thinking to new places

Pen Portrait Method

ERPO Respondents and System Interactions



ERPO Respondents and System Interactions

952 ERPOs granted at ex parte level from Dec 2016-Dec 31, 2022

n=495 (57.6%) were detained, arrested, or both

	Involuntarily detained	Both	Arrested
859 (90.2%) of those were filed by law enforcement	26.1%	2.0%	29.6%

ERPO Respondents and System Interactions



NATIONAL
COLLABORATIVE ON
GUN VIOLENCE
RESEARCH

Behavioral Health and Criminal Legal System Interactions of ERPO Respondents: A Statewide Mixed-Methods Study

GRANT AMOUNT
\$349,892

FOCUS AREAS
ERPOs



PI:
**Ali Rowhani-
Rahbar**



Staff:
**Esprene
Liddell-
Quintyn**



Staff:
Rachel Ross



Staff:
**Ayah
Mustafa**



Co-I:
**Julia
Schleimer**



Staff:
Erika Marts



PhD Student:
Niki Asa



Staff:
Sam Banks

ERPO Respondents and System Interactions

Among ERPOs with law enforcement petitioners, what **narratives** are documented in ERPO court records when the respondent is arrested and/or involuntarily detained?

n=495 (57.6%) were detained, arrested, or both

Involuntarily detained	Both	Arrested
26.1%	2.0%	29.6%

Conrick KM, Marts E, Ross R, Liddell-Quintyn E, Schleimer JP, Mustafah A, Asa N, Rowhani-Rahbar. (2025). Criminal Legal and Behavioral Health Pathways in Law Enforcement-Petitioned Extreme Risk Protection Orders. *Injury Epidemiology*.

ERPO Respondents and System Interactions

- **Critical social constructionism:** Meaning is constructed through language, institutional contexts, and social relationships
- How state actors use narratives to assign meaning to risk and danger
- Narratives are strategic

ERPO Court Document Structure

1.A ☐ I am a family or household member of the respondent. My relationship with the respondent is (check all that apply):

☐ Spouse or former spouse

☐ Parent of a child in common

☐ Current or former domestic partner

☐ Current or former cohabitant within the past year

☐ Current or former dating relationship

1.B ☒ I am filing on behalf of the Clallam County Sheriff's Office

☐ I have already notified the respondent's family or household members and any known 3rd parties who may be at risk of violence; OR

☐ My agency will make a good faith effort to provide notice to them by ☐ telephone ☐ email ☐ in-person ☐ other _____ within a reasonable period of time.

Relationship

2. ☐ I reside in this county.

☒ I am filing on behalf of a law enforcement agency that is located in this county.

☒ The respondent resides in this county.

3. Describe below any firearms the respondent currently owns, possesses, has custody of or controls.

Type of firearm	How many firearms?	Where is the firearm kept?	Date/time/place you last saw the firearm
☒ Handgun	6	Possibly in his truck as Respondent is a transient.	Not known
☐ Shotgun / Rifle			
☐ Assault Rifle			

Check all the boxes that apply and describe below:

☐ Respondent has access to someone else's firearm.

☐ Respondent expressed an intent to obtain a firearm.

☐ Respondent has unlawfully or recklessly used, displayed,

☐ Respondent recently acquired a firearm.

Describe:

Firearms

4. Between the respondent and me: List any criminal or civil protection, restraining or no-contact orders, pending lawsuits, or other legal action: If you have more than three matters, list details on additional sheet.

	Case #1	Case #2	Case #3
Case Name	None	None	None
Case Number			
Court/County/State			
Type of Case			
Protected Person			
Was there any order violation?			

5. Between the respondent and any other person: List any criminal or civil protection, restraining or no-contact orders: If you have more than three matters, list details on additional sheet.

	Case #1	Case #2	Case #3
Protected Person	None	None	None
Case Number			
Court/County/State			
Was there any order violation?			

ERPO Court Document Structure

6. Request for an Extreme Risk Protection Order

☒ I want a temporary extreme risk protection order effective immediately, without prior notice to respondent, that lasts up to 14 days, or until the court hearing:

These are the specific facts known to me that cause me to believe the respondent poses a **significant danger in the near future** of causing personal injury to self or others by having custody or control, purchasing, possessing, or receiving firearms. More detailed information is provided in the Statement in section 7.

See [REDACTED] County Sheriff's Office Case Report : [REDACTED], where the Respondent told two persons of his intent to return to the County Jail and shoot all law enforcement present there and then kill himself if he could not obtain his [REDACTED] upon his release from confinement.

ERPO Court Document Structure



Petition

Police incident reports

Affidavits

Orders/ Dismissals

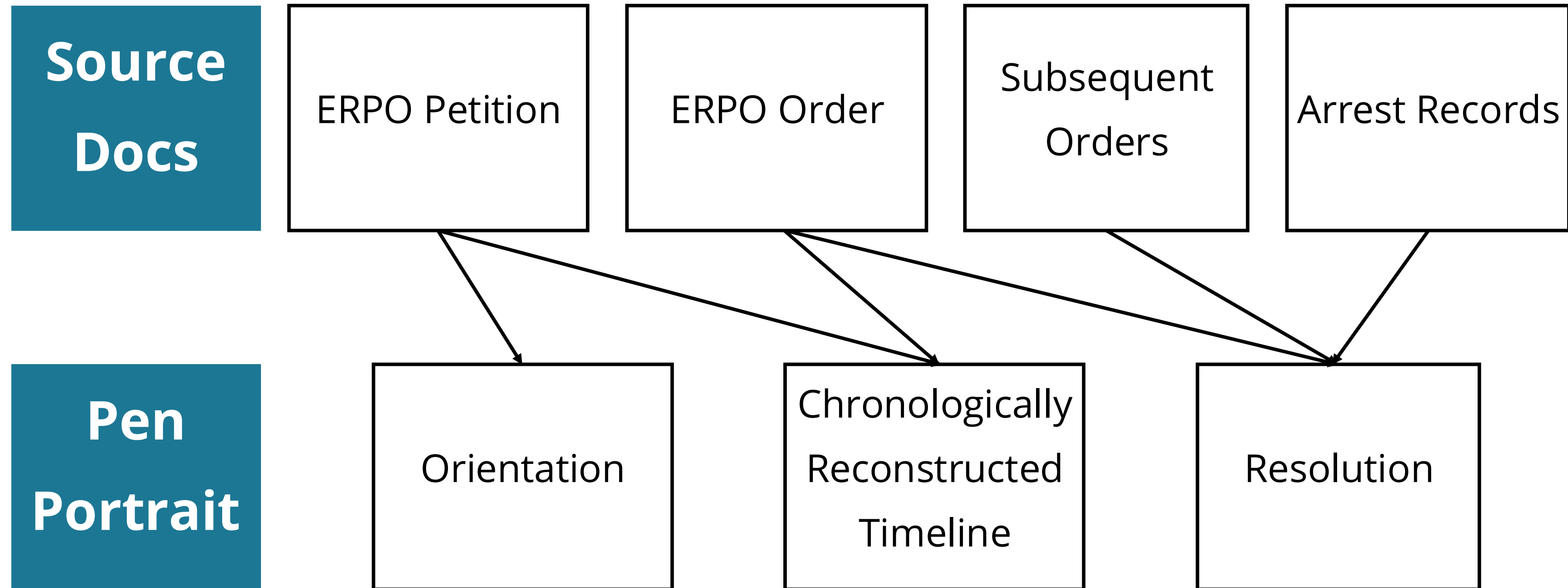
Court minutes

**Receipt for
surrendered firearms**

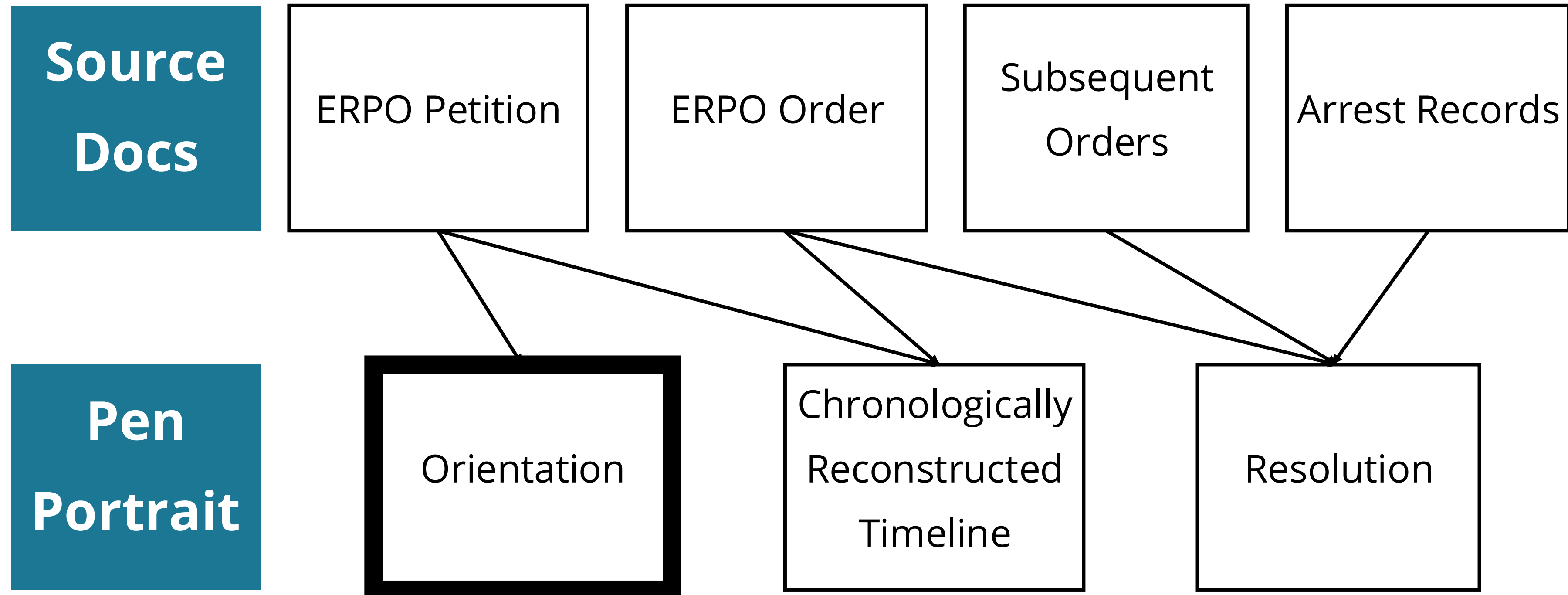
Pen Portrait Method

- Longitudinal qualitative research
 - Serial interviews
 - Intervention implementation, ethnography, experience of illness
- Goal of pen portraits: Create a focused account
 - Integrate large amounts data
 - Varied structure
 - Over time
 - From different sources

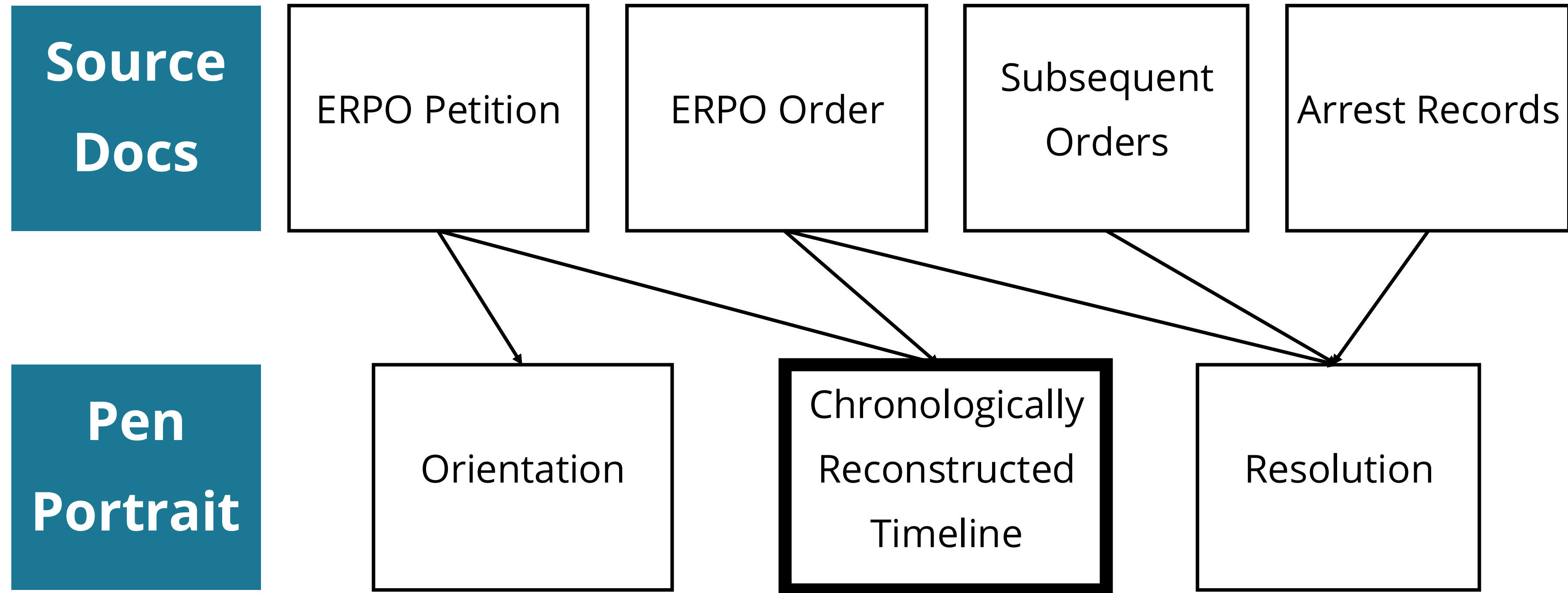
Pen Portrait Method



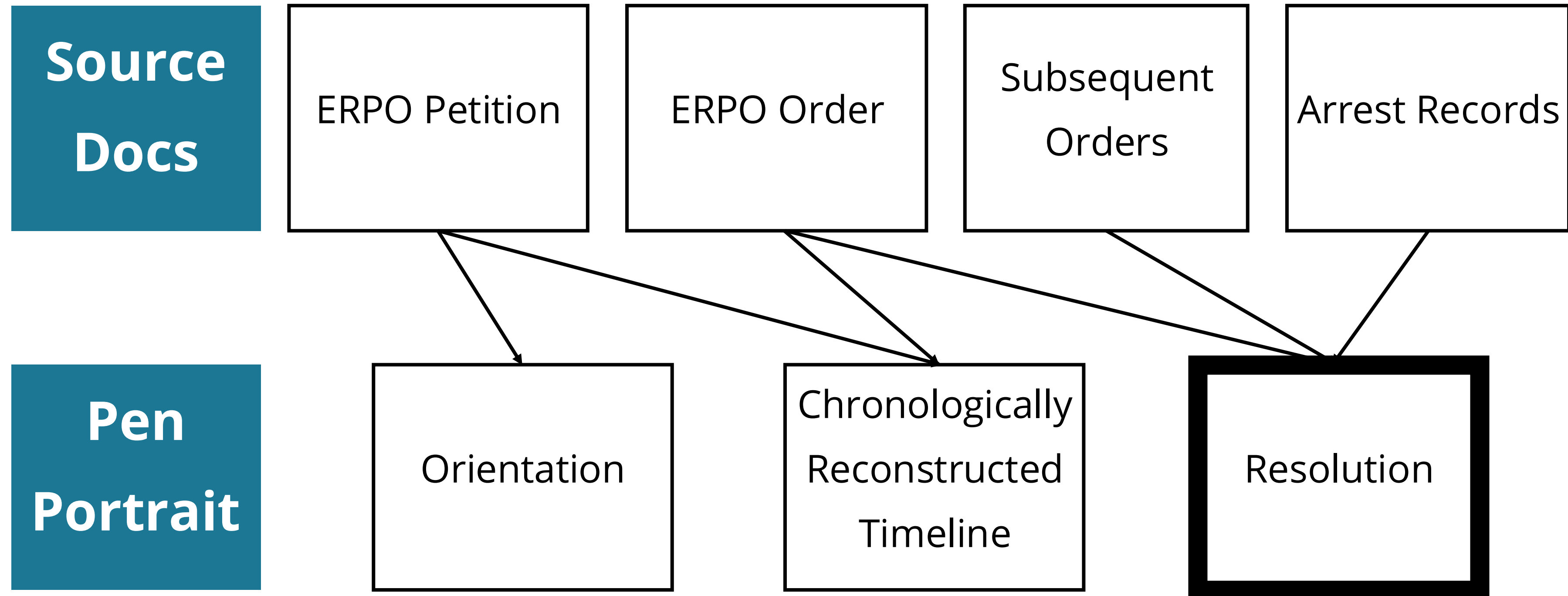
Pen Portrait Method



Pen Portrait Method



Pen Portrait Method



Pen Portrait Method: Findings

Behavior category	PATHWAY		
Public mass shooting threat			
Threat or use of violence (e.g., intimate partner violence, interpersonal violence)			
Suicide threat or attempt			
Reckless use or display			

Pen Portrait Method: Findings

Behavior category	PATHWAY		
	Invol. transport	Arrest only	Both
Public mass shooting threat	Vague threats or threats made after	Explicit threats targeting public spaces	Implicit threats; delayed arrest after invol.
Threat or use of violence (e.g., intimate partner violence, interpersonal violence)			
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Pen Portrait Method: Findings

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Threat or use of violence (e.g., intimate partner violence, interpersonal violence)	No firearm present at precipitating event	1.Explicit threats or firearm use against others 2.No firearm present, but: a. IPV involvement OR b. Extensive prior mental health system interactions OR c. Threatened law enforcement	Firearm threats or use with chemical dependency detoxification followed by arrest
Suicide threat or attempt	Acute crises such as divorce or breakup	Suicide threats or attempts involved IPV circumstances	1.Suicide attempt endangered others 2.Suicide threat and threat toward others occurred seperately
Reckless use or display	Respondents discharging firearms alone, no immediate risk to others	Firearm use directly endangered others	None

Pen Portrait Method: Findings

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Pen Po

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Public mass shooting threat			
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Suicide threat or attempt			
Public use or display	Respondents discharging firearms alone, no immediate risk to others	Firearms directly endangered others	None

Invol. Detained for BHE

“Officers responded to a reported assault involving a weapon at [RP]’s apartment.[RP] told officers that he thought someone may have been in his apartment, and when he went to transfer the gun from one hand to the other, he discharged the firearm. **There were no injuries or property damage from the incident.**”

Arrested

“Multiple witnesses reported seeing [RP] shoot rounds in his front yard, some believing he fired into the air. [RP]’s gunfire caused damage to a nearby residence **where four people, including a juvenile, were sleeping.** The bullet’s trajectory was close to the occupied bedrooms.”

Rapid Qualitative Analysis

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What is a Rapid Qualitative Analysis (RQA)?



- Addresses common challenges of traditional qualitative research
- Focuses on translating data into actionable results & insights
- Combines structured methods with flexible techniques
- Delivers timely findings that can directly inform practice

When would you consider using the RQA approach?

An RQA can:

- Reduce time & cost
- Improve data collection efficiency
- Improve accuracy
- Increase amount of data collected
- Can be utilized by teams with varying qualitative experience
- Best for teams with familiarity on the study topic
- ★ • Projects that utilize semi-structured data & have a focused/applied research questions

Applicable with a variety of data:

- Interviews
- Focus Groups
- Observations
- Secondary data (e.g, meeting minutes)

What potential limitations of the RQA approach should you consider?

- Theory generation or exploratory research questions
- Unstructured data
- Detailed types of analysis (i.e., discourse analysis)
- Non-embedded research team



RQA vs. Traditional Qualitative Methods

Example:

Table 3 Time taken to complete analysis using rapid analysis and thematic analysis

	Rapid analysis team				Thematic analysis team			
	Activity	Time taken (hours)			Activity	Time taken (hours)		
		[R1]	[R2]	Total		[R4]	[R5]	Total
Primary data review and management	Review two transcripts and develop summary template	6	5	11	Review/code initial transcripts	11	9.5	20.5
	Refine template	2	2	4	Developing framework	3	1	4
	Complete summary template for remaining transcripts	13	11	24	Review/code remaining transcripts	82		82
	Reviewing documents	2	2	4	Reviewing documents	4		4
	Reviewing matrix	2	3	5	Final themes	8		8
	Total	25	23	48	Total	108	10.5	118.5
Interpretation and report writing	Writing up findings	16	16	32	Writing up findings	4		4
	Writing recommendations	8	12	20	Writing recommendations	4		4
	Total	24	28	52	Total	8	0	8
Total				100	126.5			

Overview of RQA Process

- 1 Create domain names for interview questions
- 2 Create a template for summarizing data
- 3 Test the summary template and revise as needed
- 4 Divide transcripts among team to summarize using the template
- 5 Transfer summaries into a matrix (matrix mapping)
- 6 Synthesize findings &

Step 1: Create Domain Names

Example Question	Domain
Based on your expertise, what technical, compliance, or policy considerations should we keep in mind?	Compliance or Policy Considerations
What type of training or support would you and your team need to effectively use/upload documents into a centralized ERPO database?	Training and Resources

Tips

- Domain name should be neutral & a brief summary of question
- If interview guide is based on existing framework, constructs can be used as domains

Step 2: Create Summary Template

Interview #:

Interviewer:

Interview Date:

Analysis START Date:

SEC	Q #	Domains	Notes/Important Quotations
	1	Current Role & Responsibilities	
	1	Current ERPO Utilization	
	1	Current Database/Dashboard Utilization	
	2	ERPO document management and data-sharing	
	2	Impact of ERPO database on practice	
	3	Impact of ERPO dashboard on practice	
	2, 3	Barriers to Feasibility of Centralized ERPO database/dashboard	
	2,3	Facilitators to Feasibility of Centralized ERPO database/dashboard	
	3, 7	Data Integration Facilitators/Challenges	
	4	Compliance or Policy Considerations	
	5,6,8,12	User Access and Security Safeguard	
	5,6,7, 10	Database Key Features & Functionality	
	7	Dashboard Key Features & Functionality	
	9	Training and Resources	
	11,12	Collaboration and feedback from stakeholders	
		Other important information	

Extra information/notes:

Optional
columns

Step 3: Test Summary Template

Do the domain names make sense?

Is there additional information that needs to be captured?

How long did it take?



Step 3: Test Summary Template (Cont.)

What to include:

- Key points within each domain
- Insightful quotes
- Note of agreement or disagreement between interviewees
- Note missing data
 - “None Discussed”

Interview #: 14
Interviewer: Rachel
Interview Date: 3/27/2025
Analysis START Date: 4/29/2025

SEC	Q #	Domains	Notes/Important Quotations
	1	Current Role & Responsibilities	• Superior Court Clerk in [County Name] ◦ Responsible for all court records/files
	1	Current ERPO Utilization	• Only a few ERPOs have been filed in [County Name] ◦ These are usually filed via hard copies by LE ◦ LE will file the signed Proof of Surrender or Declaration of Non-Surrender Forms (either in person or via email) – have never had to directly interact with a ERPO respondent
	1	Current Database/Dashboard Utilization	• All hard copies of POs are scanned (via barcodes) into a document imaging system which then feeds into Odyssey (Enterprise Justice) • Do not regularly utilize JABS (only judges' access)
	2	ERPO document management and data-sharing	• Unique in [County Name] – court hands out civil PO packets, petitioners (civilians) then go to a DV clinic (within the courthouse) where they receive assistance filling out the PO and then bring them back to the clerk who then hands the POs over to the judge to review/sign • Can only recall one electronic PO being completed by a petitioner
	2	Impact of ERPO database on practice	• Already file, on average, 300 documents each day (not just POs) and has small staff – would need to minimize duplicative data entry efforts
	3	Impact of ERPO dashboard on practice	NONE DISCUSSED
	2, 3	Barriers to Feasibility of Centralized ERPO database/dashboard	• “They're county documents. My feeling is they should be owned by the county, I mean, we upload our documents every day to the digital archives. So, if you want to go out and search for a document, you can go out to the digital archives.”
	2,3	Facilitators to Feasibility of Centralized ERPO database/dashboard	• “It's nice to know when service it happens. And, like I said, as soon as they get served from the PD, they fax us over a copy of the return of service, and then we put that in our court file, and they also send us a hard copy...We don't track to see if somebody's been served. That's up to Law Enforcement agency to get them served so I assume they would be the ones that would, you know, they're tracking to make sure they get them served.”

Template summaries should be **1-2 pages for interviews and **2-4 pages for focus groups***

Step 4: Divide Tasks & Complete Summaries

- Only need ***one summary*** per interview or focus group
- Can be completed while data collection is ongoing or after data collection is complete

**May be helpful to complete when the interview or focus group is fresh in their mind*

Step 5: Transfer Summaries into Matrix

Example matrix:

	Current Database/Dash board Utilization	ERPO document management and data-sharing	Barriers for ERPO repository	Facilitators for ERPO repository	Policy Considerations	User Access and Safeguard	Key Features and Functionality	Training and Resources
Interview 1								
Interview 2								
Interview 3								

- Can use Excel, Word or Google Docs
- Can create individual matrices for each domain or can create one overall matrix
- Can use color coding to highlight a specific feature

Step 6: Synthesize Findings

- Identify any variation among or within domains
- Summarize by domain, stakeholder type, etc.
- Identify insightful quotes

Presenting findings will depend on the project goals



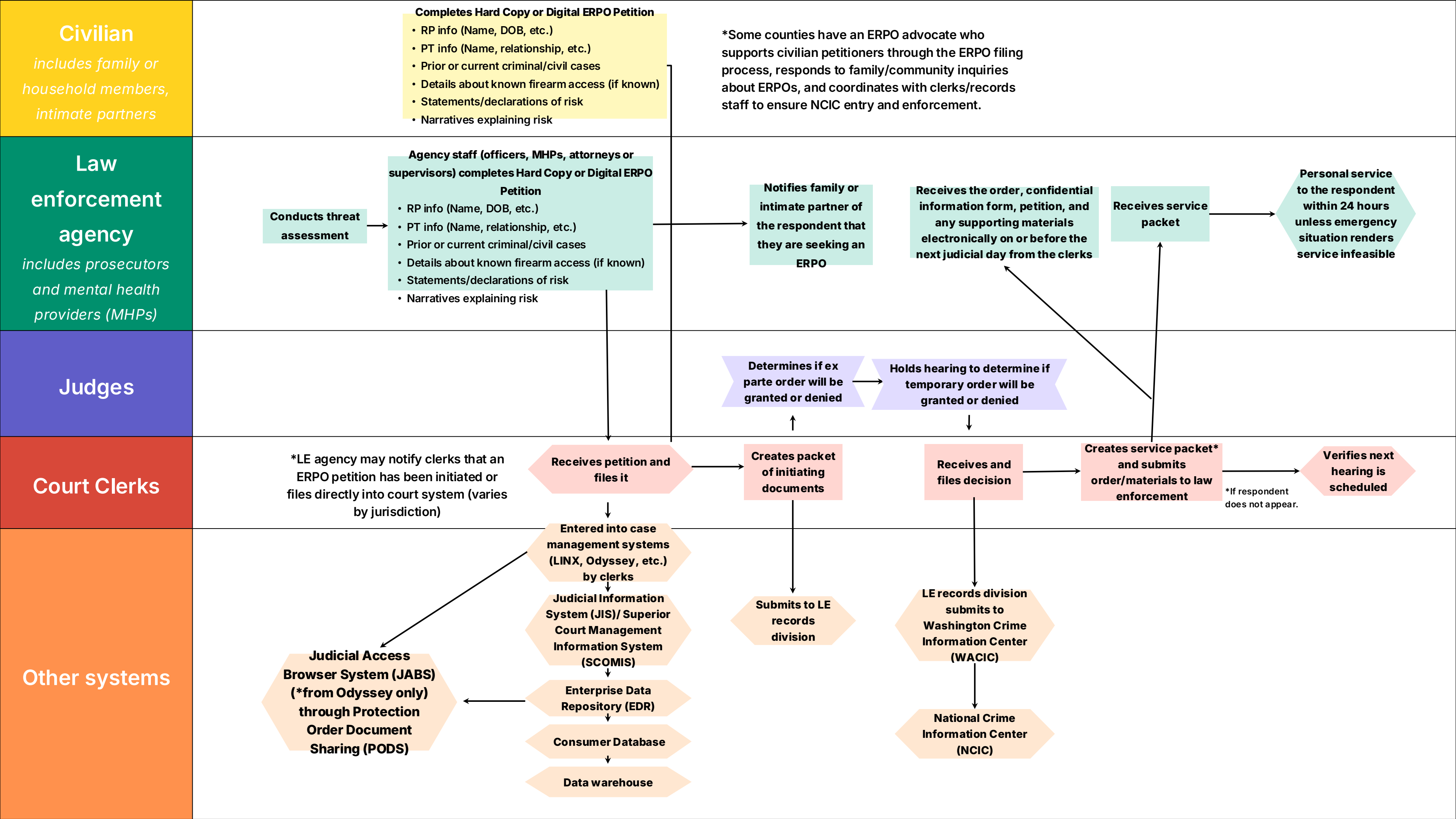
Summary Report



ERPO Workflow Process Map



Online ERPO Repository



Take a break!



BREAKOUT INSTRUCTIONS

Agenda

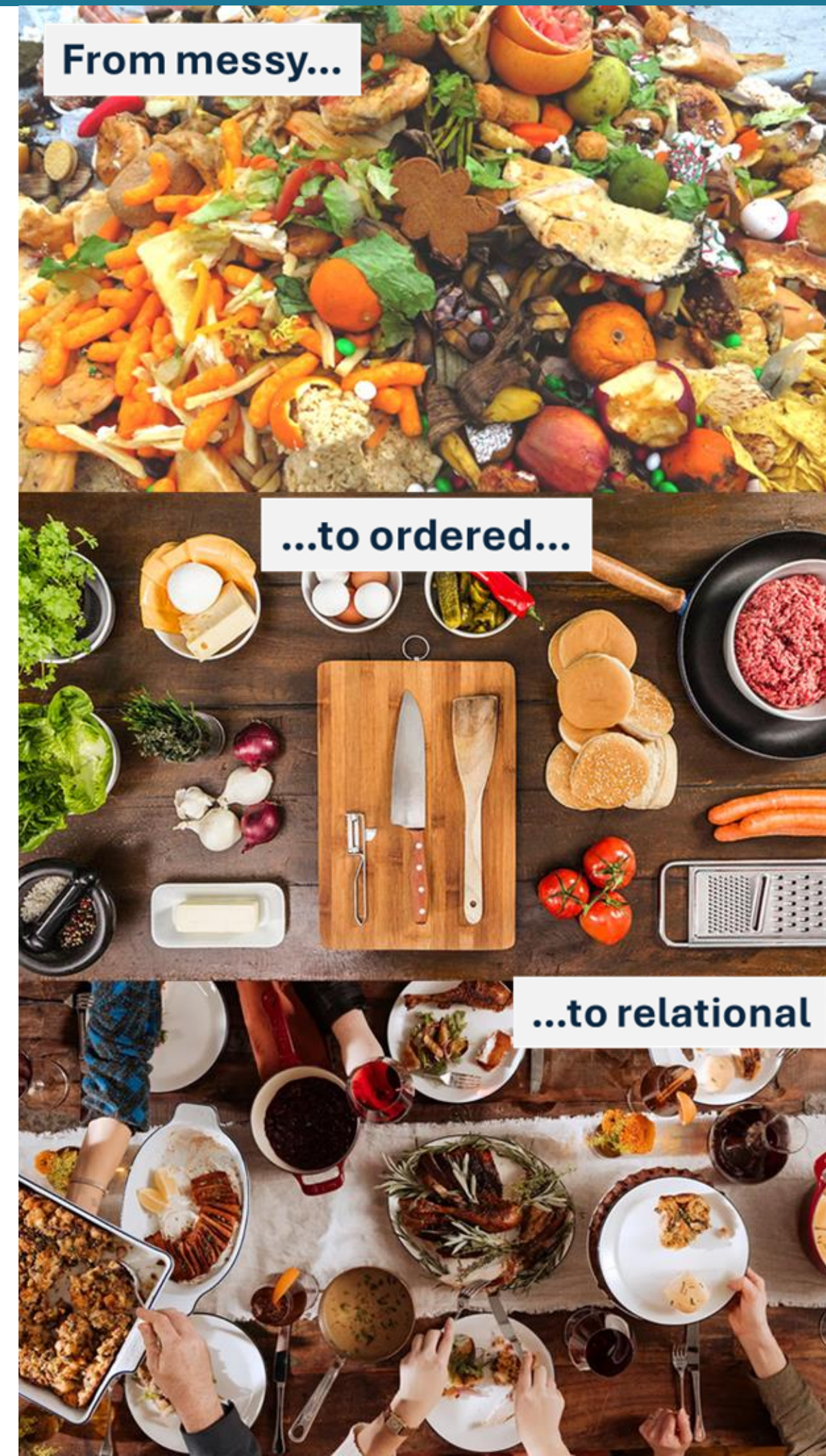
Using the materials you're now familiar with, work with your group to complete a method-specific challenge.

1. **Situational Analysis: Identifying Units of Analysis**
2. **Pen Portraits: Creating Order from Pieces of Evidence**
3. **RQA: Applied Sense-Making**

Situational Analysis Breakout

This break-out focuses on the first step of the process, comprehensively identifying elements for potential use in a situational analysis about ERPO implementation:

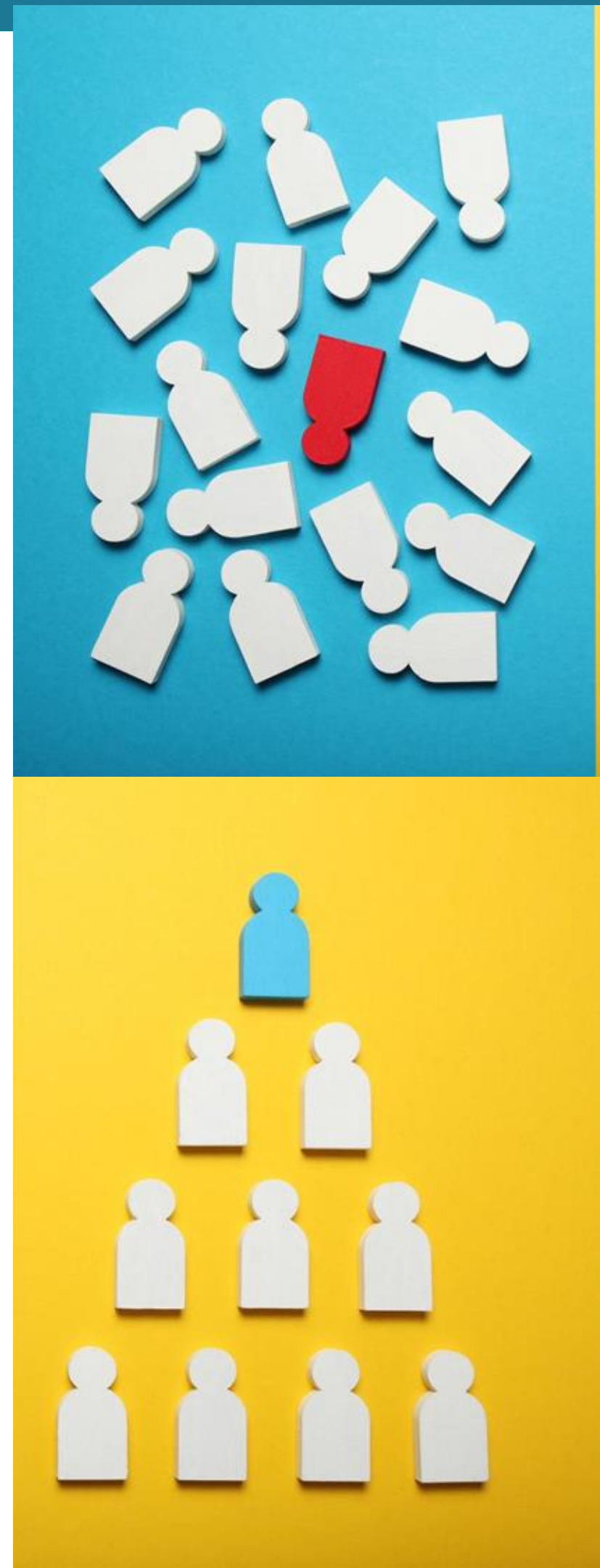
- Human and non-human actors,
- Systems (e.g., agencies, policies, networks),
- Key events or characteristics,
- Beliefs, priorities, perceptions
- Discourses and debates,
- Points of silence (i.e., what's not being said?)



Pen Portrait Breakout

This break-out focuses on the process of chronologically reconstructing a case narrative and identifying the precipitating event.

- Reorganizing fragmented data sources
- Sequencing events to understand the case trajectory
- Identifying precipitating events and turning points
- Noting gaps, contradictions, and missing information
- Reflecting on how chronology shapes interpretation and meaning



RQA Breakout

This break-out focuses on the last step of the RQA process, synthesizing stakeholder perspectives on developing a centralized ERPO document repository.

This activity focuses on:

- Reviewing a completed matrix
- Creating stakeholder-specific insights
- Developing cross-stakeholder recommendations that inform system design and implementation



BREAKOUT

Situational Analysis – Identifying units of analysis

- Begin the messy analysis: What are all the elements involved (stated or silent)?
- Begin to organize these elements within the brainstorming or new, potentially illuminating categories.

Pen Portraits – Order in chaos

- What are this case's ERPO-eligible behaviors, situational characteristics, or events?
- Determine which of the events and conditions described were background context vs the “precipitating event” for the ERPO?

RQA - Sense-making

- Begin by assigning members of your group to each professional group. Endeavor to summarize that group's perspective.
- Discuss together to find shared interests and recommendations

REPORT BACK



Situational Analysis – Identifying units of analysis

- Begin the messy analysis: What are all the elements involved (stated or silent)?
- Begin to organize these elements within the brainstorming or new, potentially illuminating categories.

Pen Portraits – Order in chaos

- What are this case's ERPO-eligible behaviors, situational characteristics, or events?
- Determine which of the events and conditions described were background context vs the “precipitating event” for the ERPO?

RQA - Sense-making

- Begin by assigning members of your group to each professional group. Endeavor to summarize that group's perspective.
- Discuss together to find shared interests and recommendations

Take a break!



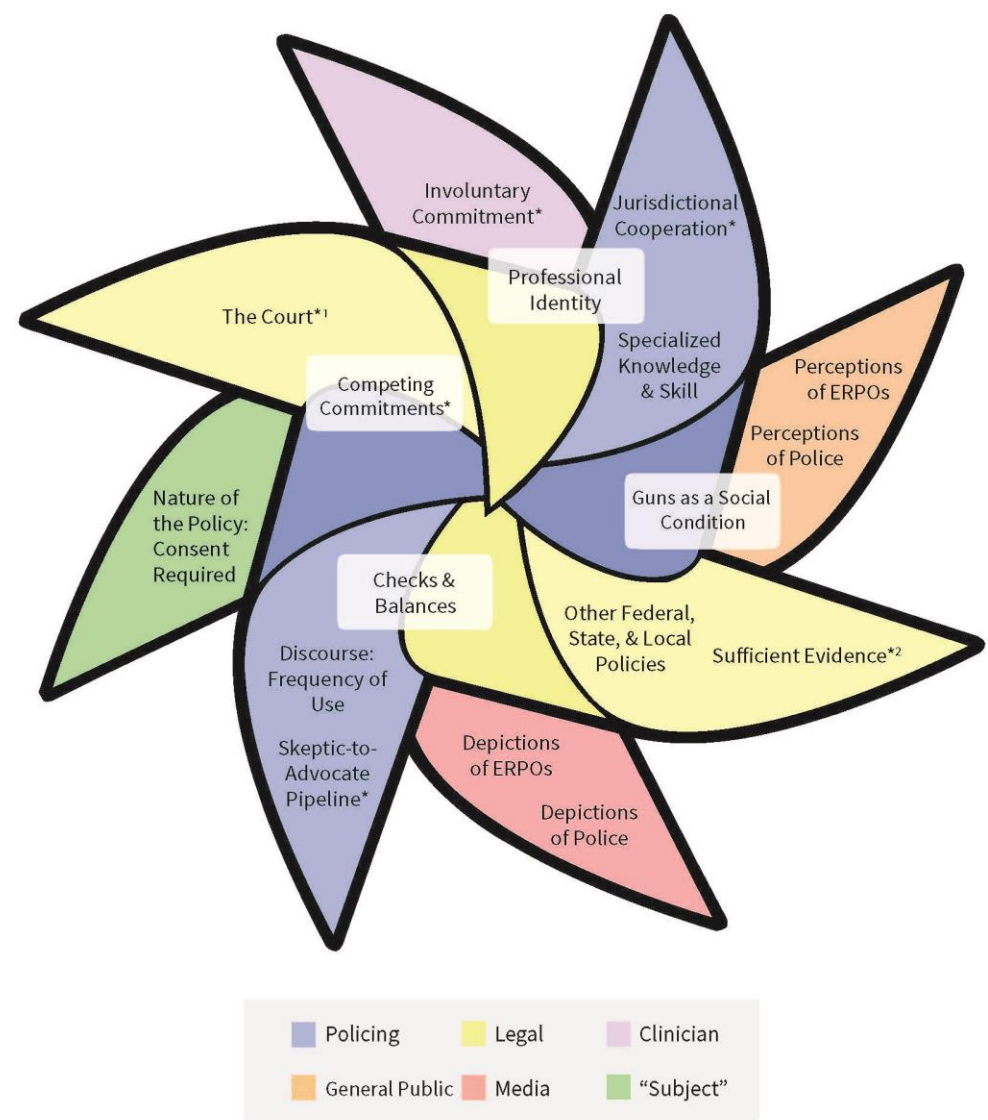
Looking Forward



Situational Analysis

Real-World Examples

Worlds and conditions shaping local viability of ERPO petitioning



3b. Positional Matrix of LEO Views on ERPOs’ Purpose and Value

	Potentially Harmful (-)	Mixed (- / +)	Potentially Beneficial (+)
Self-Directed Harm	If someone really wants to self-harm, they will. An ERPO is just a piece of paper. I don't want to be seen as punitive. ^{LM}	When someone is not in their right mind we should intervene, ^{LMH} but what if we're wrong? It is important to avoid false alarms. ^{LM}	ERPO provides a "cooling off" period and can be beneficial for all involved. ^{MH}
Self- & Other-Directed Harm	ERPO might escalate the crisis. Someone could get hurt. ^{MH} Every time we take action there is a risk. ^{LM}	ERPO could either prevent or lead to a criminal charge. ^{LMH} It also could prevent or create a "regrettable moment." ^M	Suicidal thoughts can become homicidal. ERPO is an especially important tool for responding to and preventing the "perfect storm." ^{LMH}
Other-Directed Harm	Community safety is a priority. ^{LMH} An ERPO might just be a piece of paper, but it could escalate the crisis. Someone could get hurt. ^{LM}	We are "rights protectors" but determining threat validity is difficult. We have to protect rights, and we have to prevent false alarms. ^{LM}	ERPO is designed and intended to prevent high profile events like school shootings or other public threats; the public expects us to do something. It is our role. ^{LMH}

Note: Superscript letters indicate the county use group expressing the views described. L=Low-use counties, M=Moderate-use counties, H=High-use counties.

"The Perfect Storm" = when signs of mental illness, "distain for another person," and weapon involvement were all present. This was thought to be an especially strong indicator for ERPO.

"Regrettable Moment" referred to a high-profile incident related to a missed intervention opportunity or escalation to police use of force.

Ward, J. A., Somayaji, N., Zeoli, A., Crifasi, C. K. (Under Review). Defining the policy context: A situational analysis of ERPO implementation in Florida.

Situational Analysis Real-World Examples

Analytic Progression from Messy to Ordered to Synthesizing

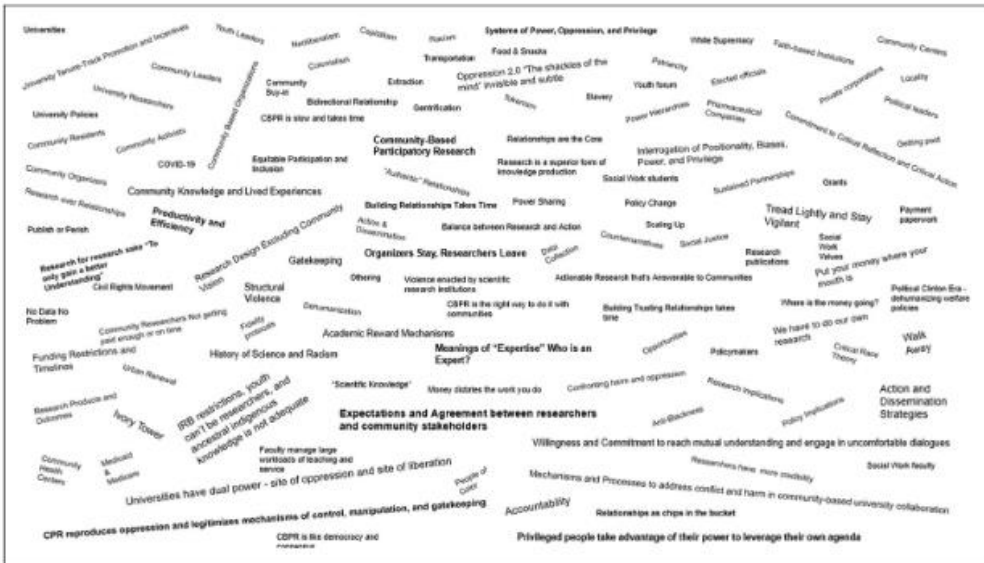


Figure 1. Messy situational map: analysis of human and nonhuman elements and actors.

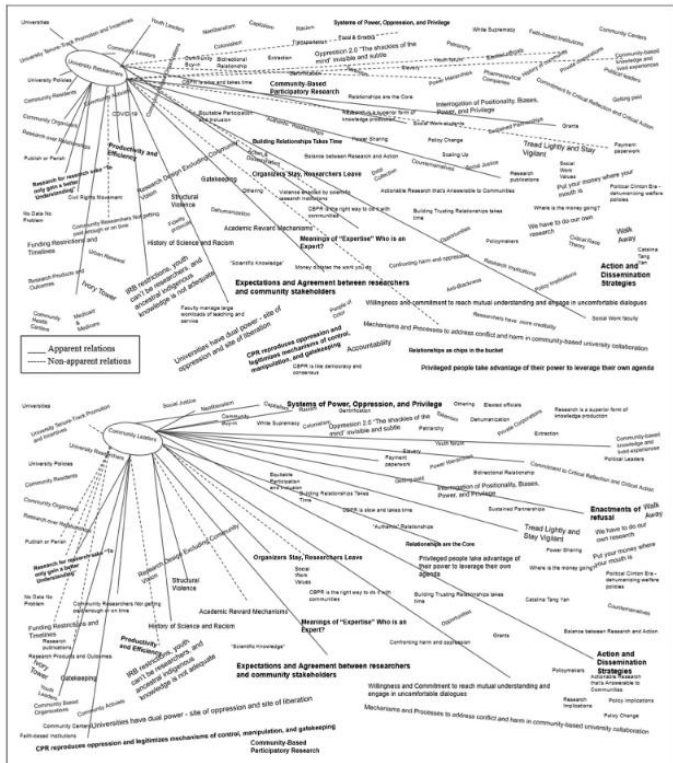


Figure 2. Relational situational map

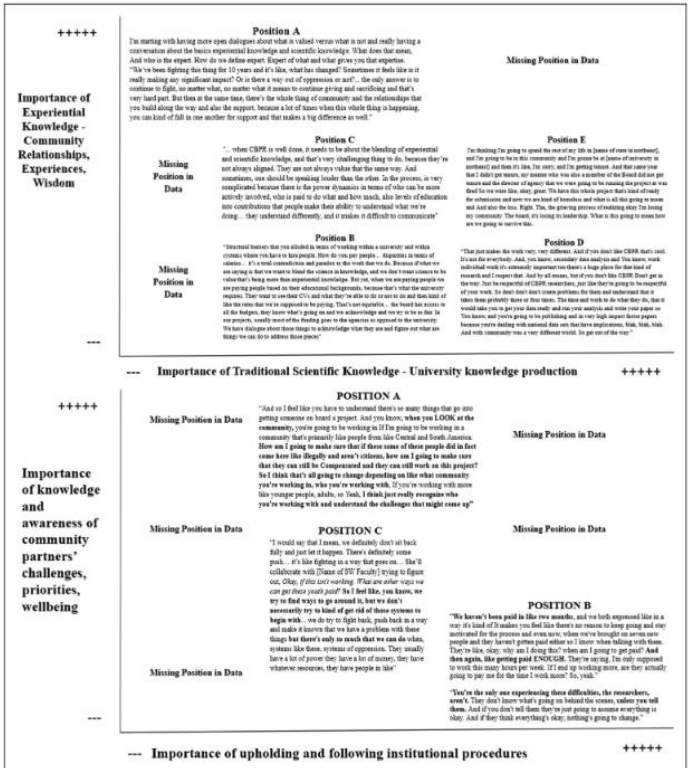


Figure 4. Drafts of positional maps analyzing importance areas of knowledge production contested.
Note. Map on the top articulates faculty's quotes and map on the bottom articulates community's quotes. +++++ more so. — less so.

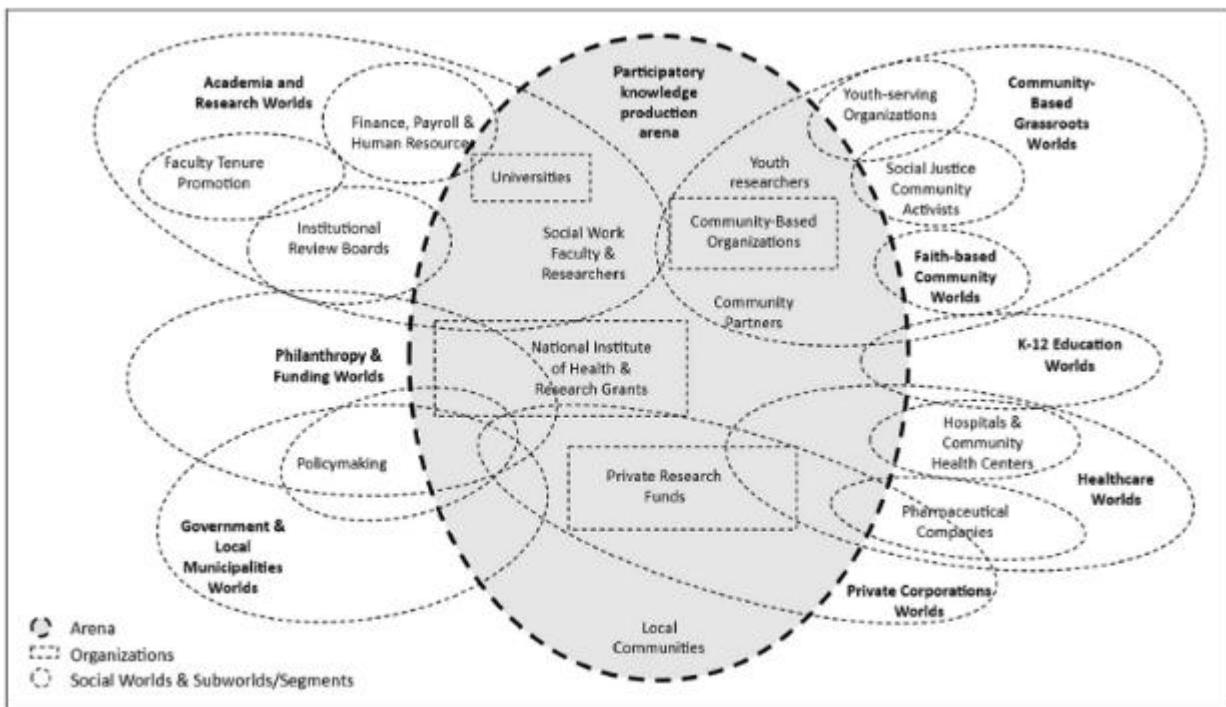


Figure 3. Social worlds/arenas map

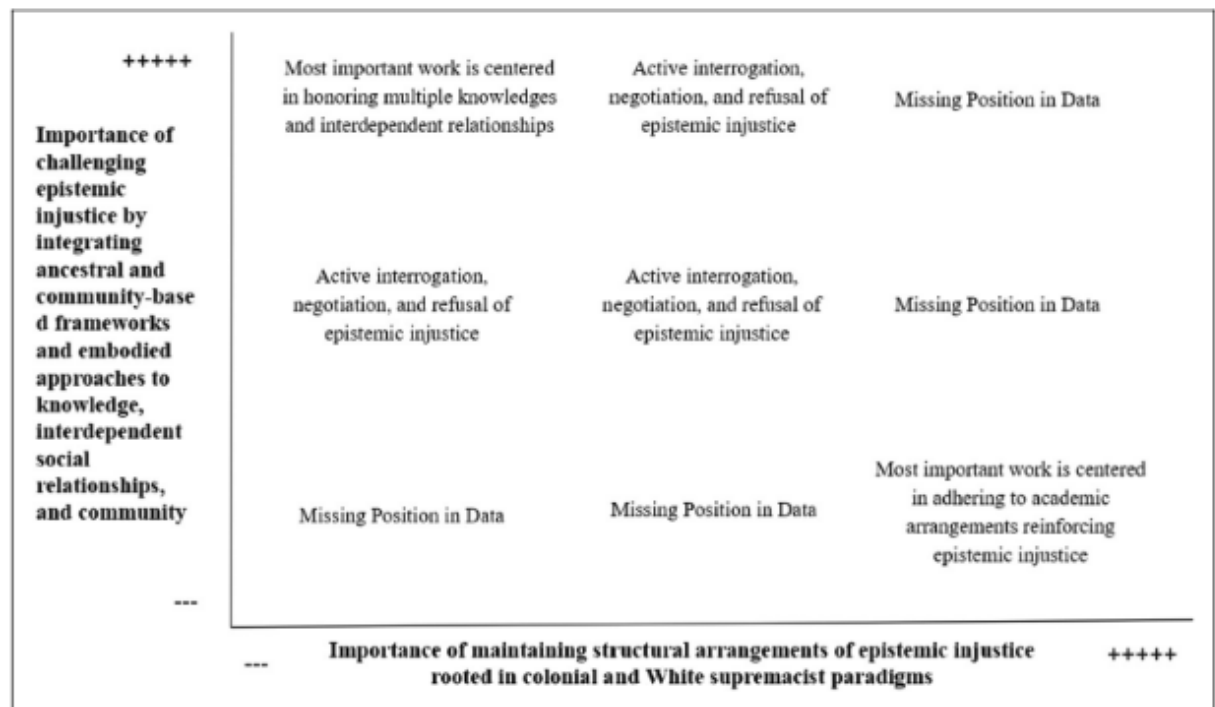


Figure 5. Positional map.
Note. Map articulates discourses related to epistemic justice. +++++ more so. — less so

Tang Yan, C. (2025). **Situational Analysis of Power in Participatory Action Research: Mapping Systemic Frameworks, Discourses, and Principles for Critical Feminist Qualitative Inquiry.** *Affilia - Feminist Inquiry in Social Work*. <https://doi.org/10.1177/08861099241300649>

Situational Analysis Real-World Examples

A couple more examples of finished products: Worlds & Arenas and Positional Maps

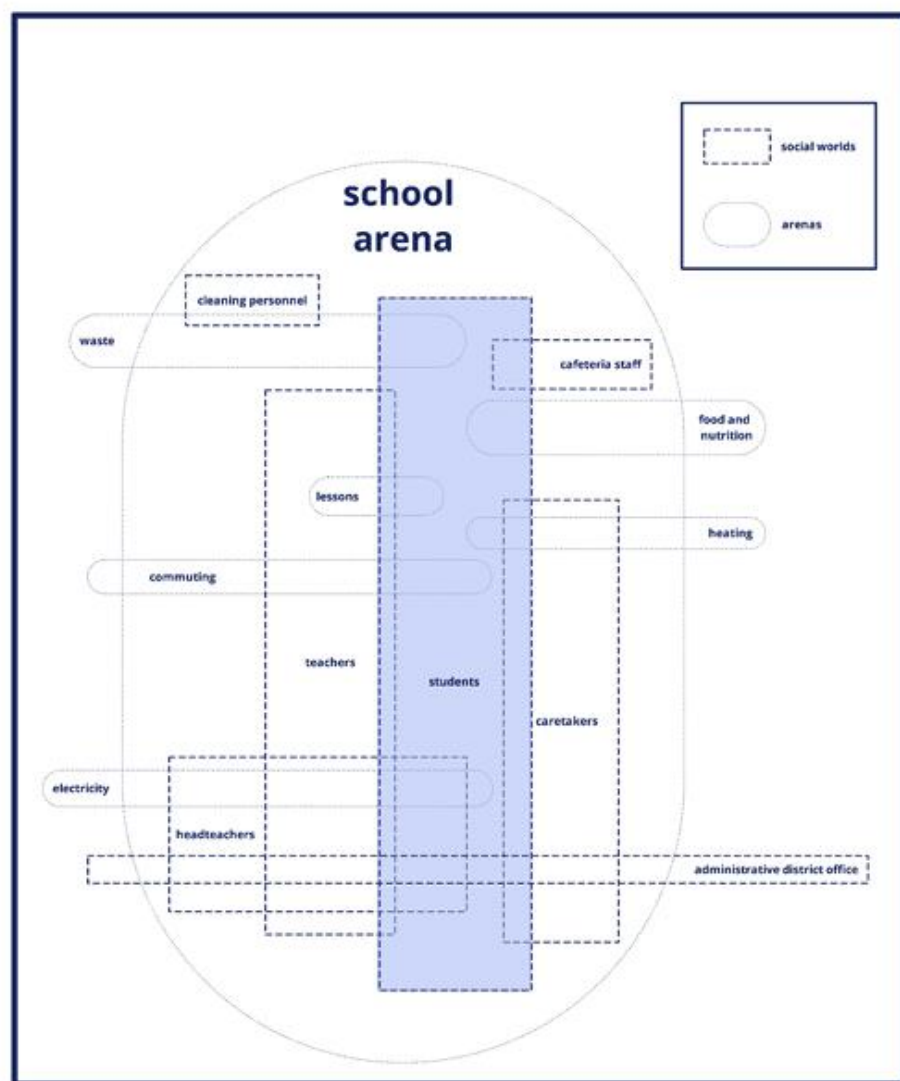


Fig. 3. Map of social worlds (cuboids) and arenas (ovals) which were relevant to the three most prevalent barriers young people had to confront trying to reduce their schools' carbon emissions. The young people are highlighted as they were at the centre of the transdisciplinary collaboration with Austrian and German schools.

Liebhaber, N., Frick, M., Trummer, J., Michelsen, G., & Keller, L. (2026). **Challenges of creating climate-friendly schools: How barriers develop out of organising processes at schools and prevent them from adopting transformative measures.** *Current Research in Environmental Sustainability*, 11, 100343. <https://doi.org/10.1016/j.crsust.2026.100343>

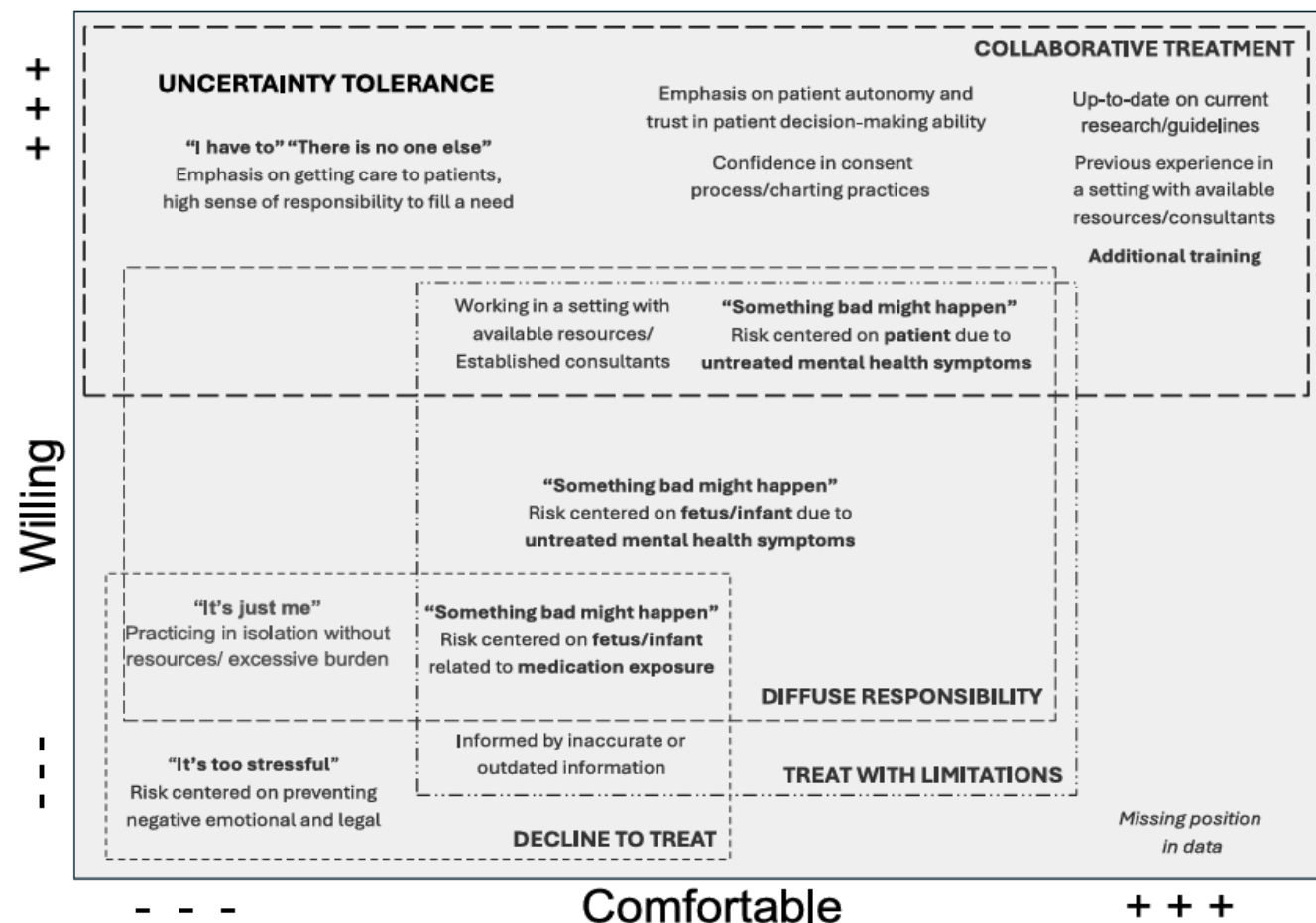


Fig. 2. Positional map of willingness and comfort among outpatient mental health providers regarding the use of psychopharmacology to treat people who are pregnant.

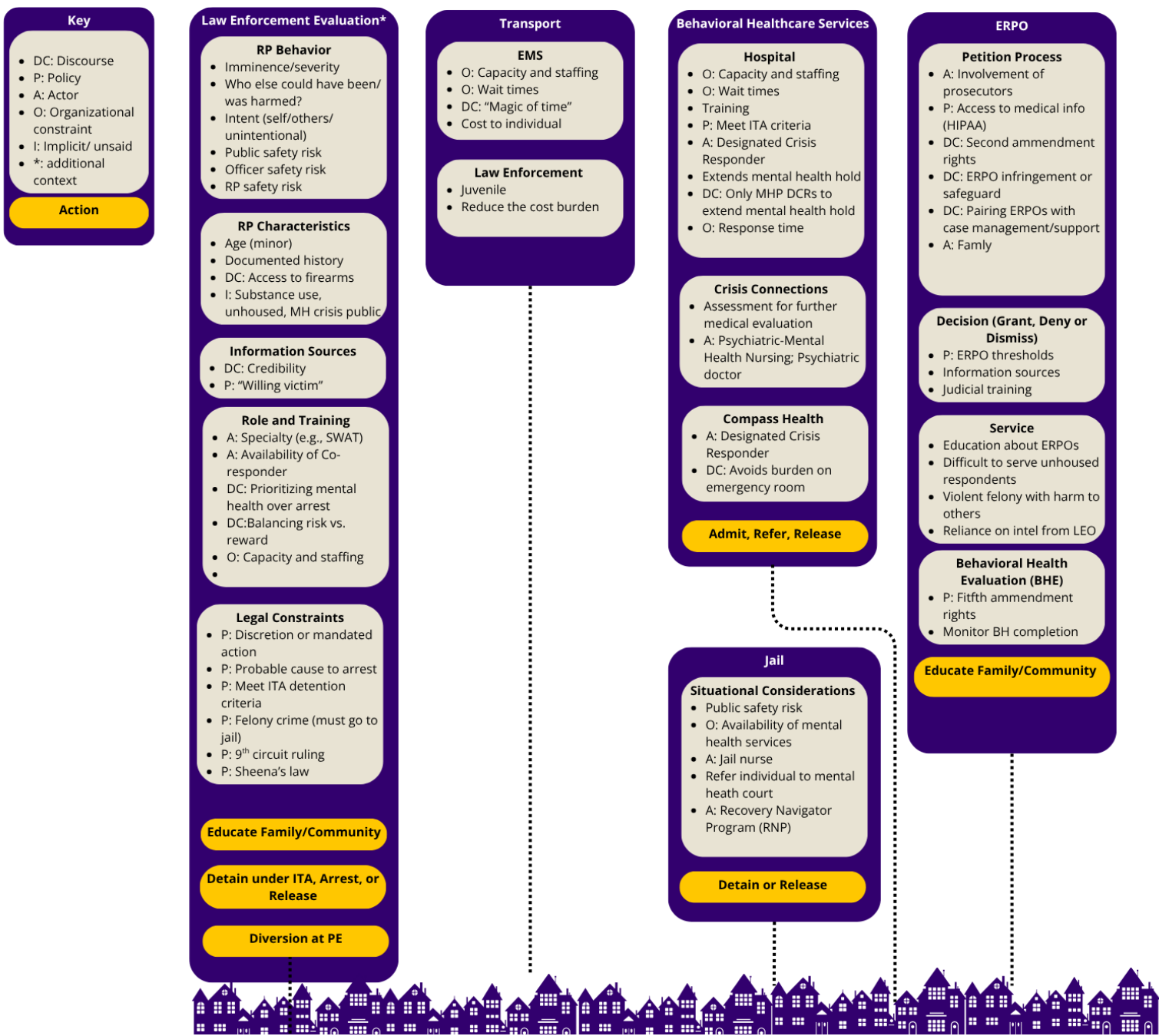
Eakley, R., Kools, S., Deutch, A., & Lyndon, A. (2025). **Understanding the prescribing practices of mental health providers during pregnancy: The role of uncertainty in the patient-provider relationship.** *SSM - Qualitative Research in Health*, 8, 100594. <https://doi.org/10.1016/j.ssmqr.2025.100594>

Situational Analysis

Real-World Examples

Conceptual Map

Figure 1. Law Enforcement Officers' Decision-Making Process



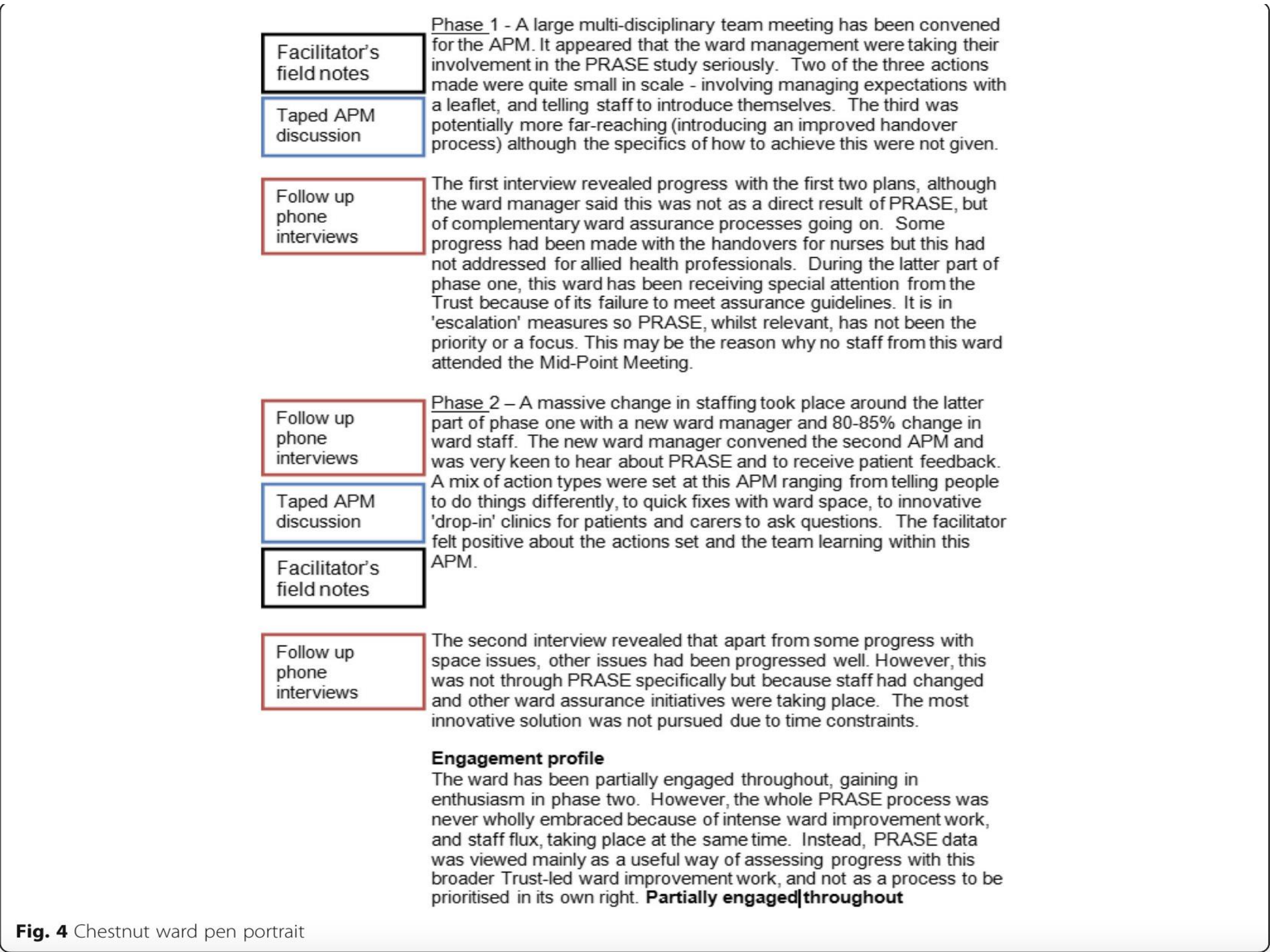
Liddell-Quintyn, E., Ross, R., Conrick, K. M., Mustafa, A., Marts, E., ... & Rowhani-Rahbar, A. (In preparation). Decision-Making Processes Involving Behavioral Health and Criminal Legal Systems for Extreme Risk Protection Order Respondents

Situational Analysis Real-World Examples

Social World/Arenas Map



Pen Portrait Real-World Examples



Pen Portrait Real-World Examples

Table 3.

Stage One – Examining the canvas - asking questions of your data and your analysis	Example 1 – Lisa’s Study Painting a picture of participant 8	Example 2 – Peter’s Study Painting a Picture of Evelyn
(1) What is missing in the analysis you have already?	Whilst the IPA provided detail of the key themes in her narrative it failed to illustrate the holistic story, the depth of personal emotion and impact experienced, the level of control, key aspects of the experience and gradual understanding and recognition of these by participant 8. The reflective nature of the account and learning post-leaving was also missing.	The themes generated from IPA were related to themes of Protection and Safety, and the Structure of Therapy. Whilst Evelyn’s interview connected with these themes in different ways, her perception of, and relationship with, boundaries in her practice were not fully represented in these themes – something had been lost.
(2) What is unique about this person’s experience?	A unique aspect of this story was the link to past experiences of abuse and the realisation of similar methods of control used, including personal shame.	Evelyn’s understanding of boundaries was very much focused on the client being at the centre of her decision-making process. In comparison the other participants were often focused on their experiences of boundaries rather than the client’s.
(3) What are the key events in this person’s experience?	Participant eight included discussion of her early experiences as important in her later story of spiritual abuse. Another key moment was when she recognised others were also being controlled, and that there was an ‘inner circle’ of favoured people.	Evelyn was able to use what she learnt about boundaries on her counsellor training course to influence her other roles. She also moved from a theoretical understanding of boundaries to a practical application of them in her practice.
(4) What does the person emphasise as important?	The pervasive nature of control was key to her story, her emphasis that everyone was controlled, people who were seen as special were part of the ‘inner circle’ but also the subject of greater demands. She also discussed the deep impact of an experience of spiritual abuse	Evelyn talked about her embodied experience of boundaries. The impact of the therapeutic relationship on her own personal boundaries. The ability of boundaries to direct the ‘flow’ of therapy.
(5) What is the context of this person’s experience?	For participant eight her experience of abuse was an important context in this experience. The denominational context in which her abuse took place was also important in shaping the specific elements of harm	Evelyn incorporated different modalities as part of her practice and had broad experience as a counsellor.
(6) Do you want to use the participant’s own words or your interpretive summary of the answers to the questions above	Lisa’s focus on narrative as a method to capture the active voice of the participant led to the decision to use their words.	Peter was drawn to writing about Evelyn through his own interpretative lens, informed by his reading and IPA of the transcription.
Stage two Painting an initial pen portrait	An initial pen portrait was constructed using quotes which reflected the answers to the questions above, so captured the holistic experience including temporal dimensions and personal emotions experienced, included quotes referencing experiences of abuse, growing realisation of control of herself and others, the importance and destructive nature of the ‘inner circle’ and the impact of the experience, personal reflections and learning post leaving.	An initial pen portrait was developed through summarising the key elements of Evelyn’s interview that answered the research question. Unlike Lisa, Peter did this initially without the participant’s quotes and tried to write down and capture what he thought Evelyn was trying to convey. However, once he had drafted the portrait, he then revisited it looking for quotes that supported (or contradicted) what he had written. This developed this first draft further. This initial picture can be summarised as follows: Evelyn discusses boundaries in terms of how they benefit the client. Power is often assumed to be with the client rather than herself. Ultimately, Evelyn sees boundaries as useful for creating a safe space for clients. But she also acknowledges their usefulness in directing (or informing) the ‘flow’ of therapy. She is happy to be flexible with her boundaries if it is for the benefit of the client. Evelyn is confident in her use of boundaries but is not rigid with them.

RQA

Real-World

Examples

Summary of stakeholder interviews as it relates to the applicable determinants of the Consolidated Framework for Implementation Research (CFIR)

	Promoters	Barriers
Acceptability <i>the perception among implementation stakeholders that a given treatment, service, practice, or innovation is agreeable, palatable, or satisfactory</i>	Integration of other screening Community leader involvement Convenience Social media campaigns	Lack of sexual health education Stigma Denialism Medical Mistrust
Appropriateness <i>the perceived fit, relevance, or compatibility of the innovation or evidence-based practice for a given practice setting, provider, or consumer; and/or perceived fit of the innovation to address a particular issue or problem</i>	Providing services in healthcare deserts Integration of other screening Care outside of normal clinic hours	Lack of sexual health education Concerns about confidentiality outside clinic setting Linkage to care outside clinic setting
Feasibility <i>the extent to which a new treatment, or an innovation, can be successfully used or carried out within a given agency or setting.</i>	Bringing testing “where the people are” Strong community leadership support (including faith-based leaders)	Lack of transportation to testing sites Clients’ perceived costs of testing and treatment Staffing MHCT and outreach testing Lack of public health funding in AL

Fig. 4 Promoters of and Barriers to Novel HIV Testing Strategies by Acceptability, Appropriateness, and Feasibility [26]

Pratt, M.C., Isehunwa, O.O., Bassett, I.V., Kempf, M.C., Gordon, B., & Matthews, L.T. (2023). **Rapid qualitative analysis approach to stakeholder and client interviews to inform mobile-based HIV testing in the U.S. Deep South.** *Archives of Public Health*, 81, 24. <https://doi.org/10.1186/s13690-023-01039-w>

RQA

Real-World

Examples

Summary of community coalition interviews to identify health equity strategies, intervention planning and delivery to address major health problems in Detroit

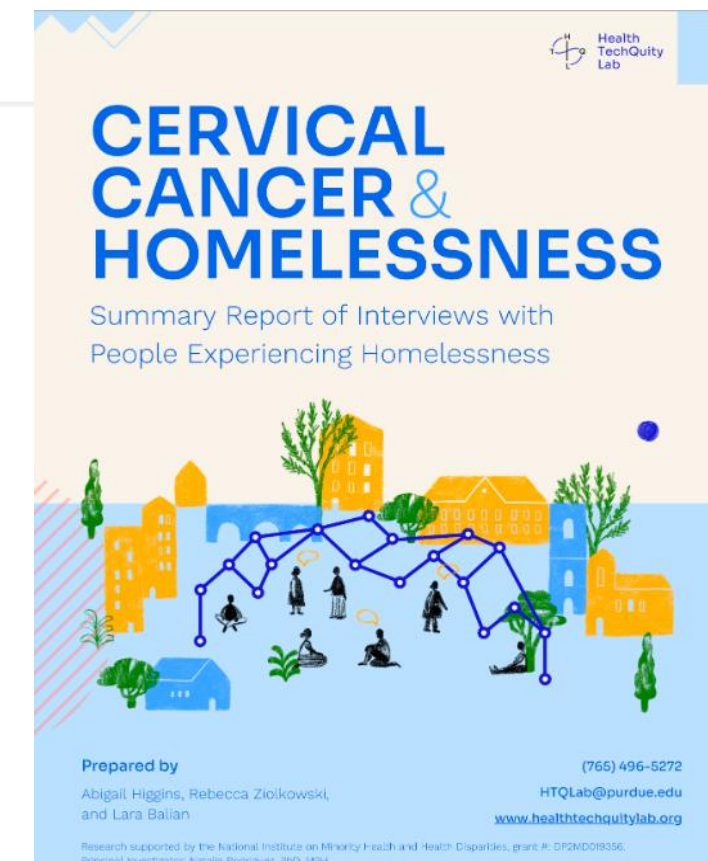
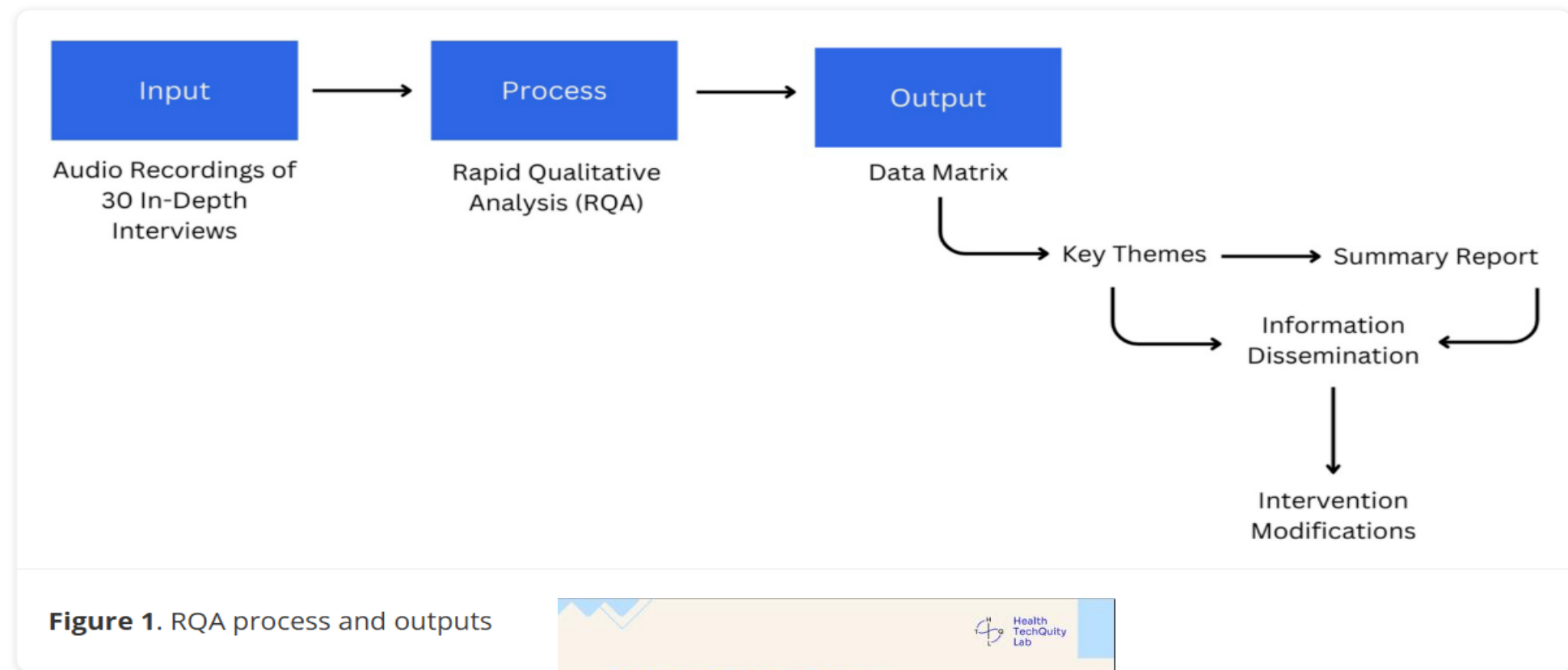
Table 2. Health Equity Strategies

Strategy	Summary of participant responses
Community engagement and advocacy	● Gender-specific strategies, specifically outreach to men by men. ● Peer-to-peer outreach and education, particularly among youth. ● Engagement with faith-based organizations (FBOs) and FBO collaboration with mental health services. ● Structured engagement of older adults and youth (in community and school settings). ● Promotion of volunteer opportunities with “on-the-ground” organizations. ● Training of community members as champions/advocates and provision of knowledge and tools. ● Collaboration with university student organizations, providing students with health outreach training and certification, especially Black students. ● Regular convening of community members to discuss problems, deliberate, problem solve, and collaborate.
Housing and built environment	● Multi-sector collaboration focused on policies, systems, and environments. ● Affordable housing with a focus on programs to build renter equity and energy sustainability. ● Initiatives to board up and secure vacant/abandoned properties. ● Support of community-based organizations (CBOs) and FBOs to build up vacant homes in occupied areas. ● Home repair programs. ● Property tax exemption support. ● Leveraging of Detroit’s American Rescue Plan Act funding to support affordable housing developers.
Neighborhood-based health care innovation	● Development of green infrastructure. ● Mobile health units. ● Pop-up services (e.g., groceries, vaccines, mental health services) in communities where those services are not part of the built environment. ● School health clinics as community health hubs. ● Community health worker (CHW) networks to facilitate peer-to-peer support. ● Community-based health care navigation.
Whole person health	● CHW infrastructure to support the viability and sustainability of the role. ● Resource navigation and care management for community residents. ● Resource mapping. ● Wrap-around care that addresses gaps in social needs and improves quality of life. ● FBO/CBO creation of transitional housing to provide wrap-around services that in 6 months position tenants to be able to support community needs.
Food security	● Seasonal farmer’s markets. ● Community grocer review program to highlight and develop food sources in neighborhoods. ● Programs focused on youth, health and nutrition education, and food-based entrepreneurship.
Digital health	● Creation of communication hubs via websites and social media to address physical activity and nutrition. ● Increased accessibility of older adult-friendly devices to bridge the digital divide and connect older adults to social and digital resources. ● Drop-in open computer labs.

Thompson, H.S., Kinney, T.N., Leach, C., Sass, A., Washington, A., Dailey, R., Towner, E., Beavers, A., Sneed, R., Solomon Edwards, K., Opara, I.N., Hampton, A., Cichon, Z., Rinky, A., & Khaldun, J. (2025). **Use of Rapid Qualitative Analysis to Support Collaborative Synergy Within a Community Coalition for Health Equity in Detroit.** *Health Equity*, 9.1. <https://doi.org/10.1089/heq.2024.0160>

RQA Real-World Examples

RQA process led to the development of a summary report that was shared with stakeholders



Higgins, A., Balian, L., Hopkins, L., Rama, A., Ziolkowski, R., & Rodriguez, N. M. (2026). **Tangible, Timely, and Thorough: A Case Study on Using Rapid Qualitative Analysis to Inform Human-Centered Intervention Design.** *International Journal of Qualitative Methods*, 25. <https://doi.org/10.1177/16094069261465280>

BREAKOUT



Agenda

How do you see the methods discussed today being useful in your work?

What possible future applications come to mind?

REPORT BACK



Agenda

How do you see the methods discussed today being useful in your work?

What possible future applications come to mind?

Digital Version of Materials

Thank you!

