The situational analysis of grounded theory in health: an integrative review of the postmodern variant of grounded theory

El análisis situacional de la teoría fundamentada en salud: una revisión integrativa de la variante postmoderna de la teoría fundamentada

A análise situacional da teoria fundamentada em saúde: uma revisão integrativa da variante pós-moderna da teoria fundamentada

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Abstract: Introduction: The complexity of the current era requires considering quantitative and qualitative perspectives, data from different sources, multiple methods, and a melting pot of approaches. To respond to this complexity, situational analysis is presented as a possible method. Methodology: An integrative review is presented in relation to the variant of situational analysis, which follows the following steps: 1) problem identification (clearly defined research question and objective); 2) literature search (comprehensive search strategy); 3) data assessment; 4) data analysis (data reduction, visualization, comparison, and conclusions); and 5) presentation of results as well as implications for practice, public policy, and future research. Results: Literature emerges that accounts for situational analysis as a methodology used in health education, health management, public policy, and health care, which incorporates elements of discourse analysis and posthumanist theories. Conclusions: Situational analysis is a methodology for understanding social, cultural, health and educational phenomena, which is available and in accordance with the multidimensional view required to understand the complexity of the environment and fluidity of the era we are living in.

Keywords: qualitative research; health planning; nursing research; public policy.

Resumen: Introducción: La complejidad de la época actual exige tener en cuenta enfoques cuantitativos y cualitativos, datos de diferentes fuentes, métodos múltiples y un crisol de enfoques. Para dar respuesta a esta complejidad se presenta el análisis situacional como

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método posible. Metodología: Se presenta una revisión integrativa en relación con la variante de análisis situacional, que sigue los siguientes pasos: 1) identificación del problema (pregunta y objetivo de la investigación claramente definidos); 2) búsqueda bibliográfica (estrategia de búsqueda exhaustiva); 3) evaluación de datos; 4) análisis de datos (reducción de datos, visualización, comparación y conclusiones); y 5) presentación de los resultados así como las implicaciones para la práctica, la política públicas y las futuras investigaciones. Resultados: Emerge literatura que da cuenta del análisis situacional como una metodología utilizada en educación en salud, gestión en salud, políticas públicas y atención en salud, que incorpora elementos del análisis de discurso y teorías poshumanistas. Conclusiones: El análisis situacional es una metodología de comprensión de los fenómenos sociales, culturales, sanitarios y de educación, que está disponible y es acorde con la mirada multidimensional requerida para comprender la complejidad del entorno y fluidez de la era que estamos viviendo.

Palabras clave: investigación cualitativa; planificación en salud; investigación en enfermería; política pública.

Resumo: Introdução: A complexidade da realidade atual exige que se levem em conta enfoques quantitativos e qualitativos, dados de diferentes fontes, múltiplos métodos e uma porção de abordagens. Para responder a essa complexidade, a análise situacional é apresentada como um método possível. Metodologia: É apresentada uma revisão integrativa em relação à variante da análise situacional, que segue as seguintes etapas: 1) identificação do problema (questão e objetivo de pesquisa claramente definidos); 2) pesquisa bibliográfica (estratégia de pesquisa abrangente); 3) avaliação dos dados; 4) análise dos dados (redução, visualização, comparação e conclusões dos dados); e 5) apresentação dos resultados, bem como implicações para a prática, políticas públicas e pesquisas futuras. Resultados: Surge uma literatura que ampara a análise situacional como uma metodologia usada na educação em saúde, na gestão da saúde, nas políticas públicas e na assistência à saúde, incorporando elementos da análise do discurso e das teorias pós-humanistas. Conclusões: A análise situacional é uma metodologia de compreensão de fenômenos sociais, culturais, de saúde e de educação, que está disponível e alinhada com a visão multidimensional necessária para entender a complexidade do ambiente e a fluidez da era em que vivemos.

Palavras-chave: pesquisa qualitativa; planejamento em saúde; pesquisa em enfermagem; política pública.

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Introduction

The complexity of the current era, in which political, economic, social, and health phenomena are combined, requires approaches that consider knowledge and data of a quantitative and qualitative order, as well as the introduction of multimethod and various theoretical approaches. [1]

In this complex context, qualitative research has also presented a renaissance in recent years. Its use has extended to different research spaces, such as nursing, education, health, care, social sciences, arts, literature, and administration. This has allowed a better understanding of the complex phenomena of study. [2]

Among the most used theoretical perspectives in qualitative research is grounded theory. This term first appeared when Barney Glaser and Anselm Strauss published *The Discovery of Grounded Theory.* Strauss was an expert in symbolic interactionism and Glaser in descriptive statistics, and they worked together in developing the theory. [3]

Grounded theory represents both a research method and a product resulting from that research. It can be defined as a set of integrated conceptual hypotheses systematically generated to produce an inductive theory about a substantive area. [4]

Situational analysis (AS), developed by Adele Clarke, is an extension and rethinking of grounded theory. With this development, the author intended to promote the interpretative turn and search for meanings, for which she considered the new theoretical perspectives provoked by the thought of Michel Foucault, Jacques Derrida, and Donna Haraway, among others. [5]

According to the author, situational analysis takes the classical grounded theory approach and incorporates constructivist, pragmatism, and interactionist social theory. Elements of Foucault are also incorporated regarding discourse analysis as a central element. [5] This methodology innovates with a view from posthumanism by including non-human objects or things in the analysis, such as cultural objects, technologies, animals, media, animated and inanimate non-human pieces of material culture, such as fumigation, architecture, among others. A key argument in science and technology studies has been that the non-human and the human are co-constitutive and constitute the world and each other. [6] This overcomes the assumption that only humans "really" matter or "matter more" in a given situation. [5]

The situational analysis also brings critical social justice approaches to qualitative research, with feminist, anti-racist, decolonizing, and democratizing commitments. This methodology provides characteristic maps that help analyze power from various perspectives. [7]

Collecting information to construct the maps includes various modalities, such as in-depth interviews, ethnographic observation, and discourse analysis. The possible data sources are all kinds of documents, websites, images, material cultural objects, technological devices, scientific or other specialized literature, and social media, among others. [6]

When performing situational analysis, the research situation is constructed empirically by making four types of maps and incorporating memos or field notes to document and detail the ongoing analysis. [4] Maps are situational, relational, social worlds, and positional.

Situational maps

Situational maps reveal the primary human, non-human, discursive, historical, symbolic, cultural, political, and other elements of the research situation and create a

possibility of analysis of their interrelationships. The deductive study of the situational map can be represented by the categories indicated by Clarke: [6]

- Individual elements and actors
- Non-human elements and actors
- Collective elements/actors
- Implicated elements/actors silenced or silenced
- Construction of discourses of individual/collective actors
- Construction of discourses of non-human actors
- Political/economic elements
- Socio-cultural/symbolic elements
- Temporary elements
- Spatial elements
- Relevant debates or topics
- Historical, visual, and/or narrative discourses

Relational maps

These maps analyze the relationships between all the elements specified in the situational map. They portray the major and minor relationships of the situation. It focuses on the most exciting relationships and then theoretically samples them by collecting more data about them, so you can decide which relationships will become the project's core. [8]

Relational maps should present an explicit key element in the approach, which is considered fundamental and linked more complexly with other aspects of the map. The memos or field notes associated with this construct provide more information regarding the exposed relationships. The analysis is done by drawing a line between the critical element and another element and posing the question: what is the nature of the relationship between these elements? The researcher decides which objects to study more closely and what information to collect about them. [9]

Maps of social worlds

World/social arena maps diagram all collective actors (social worlds, organizations, institutions) and their arenas of engagement and action in the situation, generating shared perspectives and commitments. The main objective of analyzing social worlds or arenas is to delimit the organized collective and institutional actors active in that situation. [10]

Positional maps

These maps detail the positions taken and not taken in all primary debates of the discourses encountered in the situation. They are part of the core of situational analysis. They are fundamental components for analyzing discursive materials of the situation collected through fieldwork, observation of participants, interviews, compilation of documents, and websites, among others. [10]

Positional maps focus on the issues, the positions on the issues, the absence of positions in which one would expect there to be, that is, places of discursive silence and the differences in the central discourses of the situation studied. [7]

Taking as a starting point this exposition on situational analysis, below is an integrative literature review whose objective is to relieve this variant of the theory based on the production of knowledge in health.

Methodology

This research aimed to capture the available theoretical and methodological publications about the situational analysis variant of grounded theory in different fields. To achieve this objective, the integrative review methodology was used. This specific review approach aims to synthesize previous theoretical or empirical literature to gain a complete understanding of a particular phenomenon. [11]

The methodology used considers the following stages: 1) identification of the problem, which includes the question and the objective of the research clearly defined; 2) bibliographic search, which follows a comprehensive search strategy; 3) data evaluation; 4) data analysis (data reduction, visualization, comparison, and conclusions); and 5) presentation of the results, as well as implications for practice, public policy and future research. [12]

The guiding question of this review was: What is the available evidence on the use of situational analysis in health? The inclusion criteria were articles published in scientific journals indexed in Web of Science, Scopus, and Scielo; complete text online; Keywords: situational analysis, health, grounded theory; available in English or Spanish; Publications from 2018 to 2022.

Results

From the review, 58 investigations were identified in Web of Science, 52 in Scopus, and none in Scielo. Duplicate records and those that were not in the Spanish or English languages were eliminated. We reviewed 93 records and excluded 64 unrelated to the subject investigated. From the reports evaluated for eligibility, two studies not related to the subject of the study were excluded from completing 27 articles (Figure 1) finally.
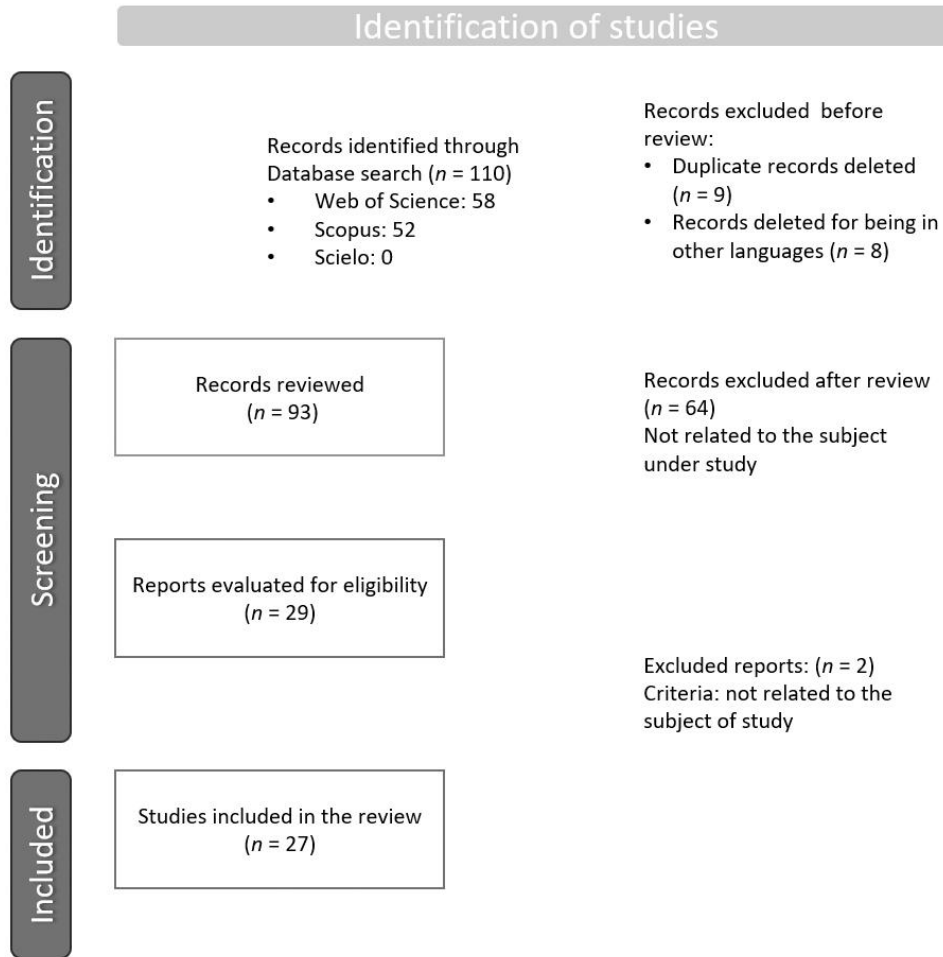
Figure 1. PRISMA Flowchart: summary of the study selection process

To organize the data for analysis, a table was designed to include the general background of each article (Table 1). The objective is collected explicitly for an inductive categorization according to the thematic axes in the next phase.

Table 1 - Characteristics of selected studies

Author	Country	Year	Database	Objective	Methodology
Almas, Awan, Bloomfield et al.	Pakistan	2022	Web of Science	Assess opportunities and barriers in research and training in non-communicable diseases.	Qualitative
Andreae, Dudak, Cherian	United States	2020	Web of Science	Report the debriefing information in the training of doctors during the pandemic.	Qualitative
Singhal, Hosking, Ward	England	2021	Web of Science	Describe the approach to problem-solving and coordination with other team members used by head nurses.	Qualitative
Verma & Sahay	India	2019	Web of Science	To explore the health care needs of adolescents living with perinatally acquired HIV and the programmatic gaps of health systems for their care in India.	Qualitative
Friesinger, Topor et al.	Norway	2019	Web of Science	Know how fire safety influences the lives of tenants in subsidized housing.	Qualitative
Klinger, Ismail et al.	Germany	2018	Web of Science	Explore the opinions and attitudes of decision-makers towards foreign-born and foreign-trained physicians.	Qualitative
Kydonaki & Kean	United Kingdom	2019	Web of Science	Understand the different factors that affect participation Adult family members in critical patient care from the perspective of patients, family members, and nurses.	Qualitative
Gordon, Ling et al.	United Kingdom	2018	Web of Science	Explore older people's accounts of their narratives of depression.	Qualitative
Mc Calman, Bainbrdge et al.	United States	2018	Web of Science	Browse the broader political, institutional, social, and economic conditions that influenced the negotiations to transfer, implement, adapt, and sustain an Aboriginal empowerment program.	Qualitative
Whittaker & Davison	United Kingdom	2020	Web of Science	To examine the perceptions of surgeons-in-training and their teachers about nontechnical skills as a concept, their role in training, and the challenges in training these skills.	Qualitative
Lake, Boyd et al.	Australia	2022	Web of Science	Generate a theory about the willingness of doctors and nurses to assess and address the social needs of patients in a hospital setting.	Qualitative

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St. Ivany & Bullock	United States	2018	Web of Science	To explore the nature and context in the lives of women who have survived brain injuries secondary to intimate partner violence.	Qualitative
Turnbull & Carr	United Kingdom	2020	Web of Science	Investigate the meaning and manifestations of collaboration in practice from the experience of patients and professionals.	Qualitative
Navvabi-Rigi, Shahboulaghi et al.	Iran	2022	Web of Science	Explore and explain the process of perceiving aging during the menopause transition.	Qualitative
Miri, Mohammadi et al.	Iran	2020	Web of Science	Analyze the changes that have occurred in the role of nurses during the last century and what factors and variables have influenced this process.	Qualitative
Ohman, Britt-Inger et al.	Sweden	2021	Web of Science	Examine health providers' perspectives on the knowledge developed in their institution and evidence-based practice.	Qualitative
O'Brien, Andrews et al.	Ireland	2019	Web of Science	Explore how nurses promote safety in the perioperative area.	Qualitative
Ahmady & Khani	Iran	2022	Web of Science	Explain and represent the teaching-learning process in the clinical training of doctors in Iran.	Qualitative
Treiber & Booysen	Iran	2021	Web of Science	Explore how adolescents with substance abuse form their identity and construct a sense of self.	Qualitative
Ramírez-Pereira et al.	Chile	2021	Web of Science	To analyze Chile's public health promotion policies in the context of COVID-19.	Qualitative
Crossway, Rogers et al.	Canada	2019	Scopus	Examine the perceptions of National Collegiate Athletic Association trainee athletes toward their peers who identify as LGBTQ.	Qualitative
Latchem-Hastings	United Kingdom	2021	Scopus	To explore the roles of carers and others in hospitality services in rehabilitating people with brain damage who are in long-stay residences.	Qualitative
Coe, Dorgan et al.	United Kingdom	2021	Scopus	Determine facilitators and barriers to recruitment in clinical trials and suggest recommendations for recruitment in pandemic situation.	Qualitative
Hofstetter, Tinhof et al.	Austria	2022	Scopus	Identify experiences and challenges of hospitalized patients with COVID-19 during illness and treatment.	Mixed

Hengyotmark & Kusoom	Thailand	2022	Scopus	Understand physical distress, psychological distress, and coping experiences among people infected with COVID-19.	Mixed
Nyerges, Dajani et al.	United States	2022	Scopus	Learn about interpreters' positions in their work with newly arrived refugees and the associated meaning-making processes.	Qualitative
Revell, Gillespie et al.	United Kingdom	2021	Scopus	Test a cognitive-behavioral model of idiopathic falls.	Qualitative

Source: Own elaboration (2023)

After the content analysis, four thematic axes were identified in which the situational analysis of grounded theory was used. The different types of maps accompanying the reflective process were considered for this. The categories that emerged from this inductive analysis are:

1. Health education: This category describes all those articles in which grounded theory was used for patient education and training and education of health professionals.
2. Health management: Health management includes all those elements that account for using situational analysis to know, explain and implement actions to manage an organization's resources better.
3. Public policies: In this category, reports are indicated that can project the use of the results in improvements at the macro and meso levels in health.
4. Health care: This axis accounts for the use of situational analysis in aspects related to direct care, both from the point of view of physical and psychosocial health and the implications linked to better care.

In Table 2, it is possible to observe the different articles grouped according to categories or thematic axes.

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Table 2 - Thematic axes emerging from the selected articles

Thematic axis	Title	Author	Country	Year
Health care	The ambiguous influences of fire safety on people with mental health problems in supportive housing	Friesinger, Topor et al.	Norway	2019
	Family involvement in intensive care: a qualitative exploration of critically ill patients, their families, and intensive care nurses (INpuT study)	Kydonaki & Kean	United Kingdom	2019
	Talking about Depression during Interactions with GPs: a qualitative study exploring older People's Accounts of their depression narratives	Gordon, Ling et al.	United Kingdom	2018
	Explore the preparation of senior physicians and nurses to assess and address the social needs of patients in the hospital setting	Lake, Boyd et al.	Australia	2022
	Living in Fear and Prioritizing Safety: Exploring Women's Lives After Traumatic Brain Injury from Intimate Partner Violence	St. Ivany & Bullock	United States	2018
	Weaving a cocoon on the Road to the Transcendence of Aging: a theoretical study based on the Perception of Aging during the Transition to Menopause	Navvabi-Rigi, Shahboulaghi et al.	Iran	2022
	Nurses Keep Patients Safe by Managing Risk in Perioperative Settings: A Classic Grounded Theory Study	O´Brien, Andrews et al.	Ireland	2019
	(Re)construction of the identity of adolescent women with substance use disorders	Treiber & Booysen	Iran	2021
	Lesbian, Gay, Bisexual, Transgender, and Queer Athletic Coaches: Perceptions of College Student-Athletes	Crossway, Rogers et al.	Canada	2019
	Care Relationships on the Margins of Neurological Care Home Life: The Role of "Hotel Service" Staff in Brain Injury Rehabilitation	Latchem-Hastings	United Kingdom	2021
	Experiences and challenges faced by COVID-19 patients who were hospitalized and Participated in a Randomized controlled trial: a qualitative study	Hofstetter, Tinhof et al.	Austria	2022
	Physical and psychological distress and coping with situational dilemmas experienced by people infected with COVID-19: a mixed-method study	Hengyotmark & Kusoom	Thailand	2022

	Balancing Yourself: A Qualitative Study Exploring the Experiences of Interpreters Working with Refugees in the United States	Nyerges, Dajani et al.	United States	2022
	Fall attacks as a subtype of FND: a model of cognitive behavior using grounded theory	Revell, Gillespie et al.	United Kingdom	2021
Health education	Opportunities and challenges for research and training in non-communicable diseases (NCDs) in Pakistan: a qualitative study from Pakistan	Almas, Awan, Bloomfield et al.	Pakistan	2022
	Informative Data and Observations on healthcare simulation to Prepare for the COVID-19 Pandemic	Andreae, Dudak, Cherian	United States	2020
	Lack of communication and awareness in training non-technical skills? A qualitative analysis of the Perceptions of Trainers and Trainees in surgical training	Whittaker & Davison	United Kingdom	2020
	Situational Analysis of Teaching-Learning in Clinical Education in Iran: A Postmodern Study of Grounded Theory	Ahmady & Khani	Iran	2022
Management	A qualitative study: What do nurses in charge do in emergency departments?	Singhal, Hosking, Ward	England	2021
	Medical professionalism of foreign-born and trained doctors under scrutiny: a qualitative study with stakeholders in Germany	Klinger, Ismail et al.	Germany	2018
	The Collaboration Compass: A Preliminary Model for Navigating Collaborative Practice	Turnbull & Carr	United Kingdom	2020
	The trend in the role of licensed practical nurses in the health system: a situational analysis	Miri, Mohammadi et al.	Iran	2020
	Developing evidence-based professional and practical knowledge in confusing versus supportive work organizations: a situational analysis of the grounded theory of elder care in Sweden	Ohman, Britt-Inger et al.	Sweden	2021
	Identifying the ideal recruitment situation in pandemic research: learning from the RECOVERY trial in the north of England: a qualitative study	Coe, Dorgan et al.	United Kingdom	2021
Public policies	Health Care Needs and Programmatic Gaps in the Transition from Paediatric to Adult Care of Mother-to-Child HIV-Infected Adolescents in India	Verma & Sahay	India	2019

| The Australian Aboriginal Family Welfare Program: A Historical Analysis of the Conditions That Allowed Its Spread | Mc Calman, Bainbrdge et al. | United States | 2018 |
| Public health promotion policies in the Context of COVID-19 in Chile, an approach from situational analysis | Ramírez-Pereira et al. | Chile | 2021 |

Source: Own elaboration (2023)

Discussion

Situational analysis is considered the last variant developed from grounded theory, which since its creation in 1967 by Glasser and Strauss, has shown a constant evolution. It has enriched studies in various fields, specifically health, due to the complexity of studies in this area, which require a multidimensional and multidisciplinary approach. [5]

The available evidence shows the possibility of using it in several areas. In this particular research, the areas of health education, health management, public policies, and health care emerge.

In *health education*, its use stands out in working with patients and training health professionals, incorporating multiple data collection techniques such as in-depth interviews, focus groups, non-participant observation, and content analysis. Discourse analysis is also included in the context that one of the characteristics of situational analysis is to recognize the plots between the positions of power that emerge from the discourses of the different social actors. Another exciting aspect is the relevance to health education studies in their territories and context where individuals, groups, and communities operate, highlighting the multidirectional integration in these spaces. [13-16]

It has also been used in the area of clinical simulation, specifically in the training of medical professionals in techniques and procedures. This constitutes an innovation and, at the same time, is evidence that supports the use of situational analysis in clinical simulation environments, in which this methodology contributes to the evaluation and improvement of performance in these environments. As a background, it is increasingly challenging to access direct work with patients, especially in the first years of training, so clinical simulation and different evaluation methods take on special prominence. [13, 15]

Another interesting aspect of the use of situational analysis lies in the importance that researchers give to the levels of research and triangulation. Although this variant is not framed in the positivist paradigm, in which triangulation is favored from different areas, it is possible to observe that researchers in health triangulate and observe phenomena from various epistemological and ontological positions, thus reinforcing the rigor of qualitative research. [13-16]

In the category of *health management*, situational analysis stands out for its relevance in effective planning, coordination, and communication in different healthcare environments, intending to safeguard patient safety and quality of care. It is also used in strengthening evidence-based practice by critically addressing the diverse stances of health professionals concerning their performance. Triangulation is used in data collection and analysis in the health education category. An example of application is the development of

updated profiles of health professionals, specifically nurses in Iran, which contributes to the delimitation of roles and protocols of good practices in their professional practice. [17-22]

Concerning the use of situational analysis in the field of *public policies,* it highlights its relevance, especially at the macro-policy level and also from a perspective of description and evaluation of the policies adopted in the various countries. This reflects a critical and complex look at the context in which decisions are made, mainly the projections and improvements that must be implemented to increase equity and social justice. [23] The importance of collective construction with the participation of all social actors is also emphasized. [24] One reviewed study presents a situational analysis of public policies during the pandemic. The study revealed that the situational analysis map gives visibility to all actors, including silent minorities, and makes explicit the space they demand as demands. According to the work's author, this map observed the presence of men in different categories of decision-making and geographical concentrations, excluding voices from peripheral areas, women, dissidents, minorities, children, people with disabilities, and people with rare or orphan diseases. [25]

Finally, in the *health care* category, there is a majority use of situational analysis with a diversity of epistemological approaches, as well as in information collection techniques, where a melting pot of views and approaches is always presented under the methodological umbrella of this variant of grounded theory. In this axis, it is possible to observe that situational analysis occurs in hospital and community environments, which include both the patient's experience and his family and the health team. Research has been conducted in critical care services, long-stay residences, primary care, and operating rooms. Regarding health conditions, research is observed with older people, the LGBTQ+ community, young people with illicit substance abuse, people with COVID-19, and people suffering from idiopathic falls, among others. [26-39]

Despite the reflexivity that involves the look at the various levels and the evidence it can provide on the importance of approaching complex solutions, situational analysis is in the making in health, so readers are invited to immerse themselves in the richness of the variants of grounded theory.

Conclusions

Using situational analysis as a methodological strategy enriches the understanding of the different phenomena of study by incorporating into the traditional method a critical and vindictive look contained in the discourse analysis.

The maps that emerge from the situational analysis can be used to plan research-based interventions and, in this way, implement changes in various areas, such as nursing, health, education, and business.

Situational analysis as a methodological strategy enriches the understanding of study phenomena, promotes research-based planning, and encourages participation and collaborative work. Although its use in the health field is incipient, it has a significant potential that invites us to explore the variants of grounded theory.

On the other hand, the discourse analysis component in the situational map allows an explicit analysis of the power relations between the different actors. It enhances participation and collaborative work, thus strengthening the role of research as an inclusive and democratizing instance.

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