# Section VII.


# Designing a Qualitative Study

# Issues in Designing a Qualitative Study

- **Flow of the Study**

- **Agree on Decision(s)/Action(s) Needed**

- **Setting study objectives**

- **Methods & sequence of methods**

- **Personnel**

- **Site selection**

- **Managing the field work**

  - **Logistics Needs**

  - **Daily Activities**

# Flow of the Study

**Planning & Preparations**

      Agree on decision/action to take

      Study objectives

      Select personnel

      Site selection

      Logistic preparations

**Mini-study:** 1 week;

**RRA, RAP:** 1 - 2 Months

**Training**

**Initial training:** 2-4 Days
**Continued training:** during
information gathering phase

**Information Gathering
& Analyses**

**Varies greatly between
studies types:**
2-5 days for mini-study;
5-8 days for RRA;
2-4 weeks for RAP

**Applying Data to Programs**

      Analysis

      Feedback

      Report Writing

      Revise and test plans

**Analysis, Report
Writing and Feedback:**
3 - 6 days for mini-study
and RRA;
1 - 2 weeks for RAP.
**Revise and test plans**95
1+ weeks

# Agree on Decision(s)/Action(s) Needed

- Assemble personnel involved with program management
  - program manager and officers
  - health educators/trainers
  - health/management information specialists
- Agree on decision(s) or action(s) to be taken from the study findings, for example:
  - community priorities to address;
  - specific behaviors or attitudes to target;
  - ways to improve quality of services;
  - vulnerable groups to target;
  - best persons to train/educate;
  - organizations/individuals to work with/through;
  - times/places for program activities;
- Ability to make this decision(s) or take this action(s) becomes the overall goal(s) of the study
  - Study may be necessary, although not sufficient to make decisions / take action

# Setting Study Objectives
**(from Freudenberger, 1998: CRS RRA/PRA Manual)**

- "Objectives are, quite simply, what the team wants to learn during the study."
  - What questions need answering to make decision(s) or take action(s)?
- Objectives unify the team around a common agenda and set the boundaries of what needs to be learned
- Objectives help identify who should participate in the study (what expertise is needed to answer the questions)
- Set boundaries: select 3-4 main objectives each with their own sub-objectives
  - Not too broad for the resources (time, people) available to thoroughly cover objectives
  - Not too narrow that important information is missed
  - Review existing qualitative study guides for expert opinion on study objectives for different topic areas
  - Adapt objectives from other studies to the resources available to you!

# Select Methods for Study
**(from Freudenberger, 1998: CRS RRA/PRA Manual)**

- Identify a variety of methods that can be used to answer each of the study objectives and sub-objectives
  - Develop a matrix of objectives on y-axis on left and possible methods on x-axis on top
  - For each objective, identify several methods useful to gather information on the topic
  - Consider not using methods that have limited utility in terms of the number of objectives

- Select preferred methods for the study
  - This is a starting point to help with scheduling
  - During the study be flexible as new topics and other methods may become more desirable

- Select preferred sequence of methods
  - move from general to specific information
  - move from less sensitive to more sensitive
  - collect information early that will help you ask specific or sensitive questions later

# Personnel
(from Gittelsohn et.al., 1998; Freudenberger, 1998)

- Principal Investigator/Study Coordinator
  - overall responsible for administering and supervising the study
  - Full-time involvement during the study
  - Preferably familiar with computers
- Logistics Coordinator
  - Assists in all logistic aspects of the study
  - Part-time throughout the study
- Trainer
  - Needed if Study Coordinator is not able
  - Full-time involvement during the study
- 1 - 3 Multidisciplinary Study Teams of 3-5 persons
  - Team leader with two to four interviewers
  - Full-time involvement during the training, data collection and analysis
  - Able to write well in English (or national language)
  - Preferably speak local language fluently
- Translators
  - Needed for each interview by study team without local language capacity
  - Teamed with interviewer
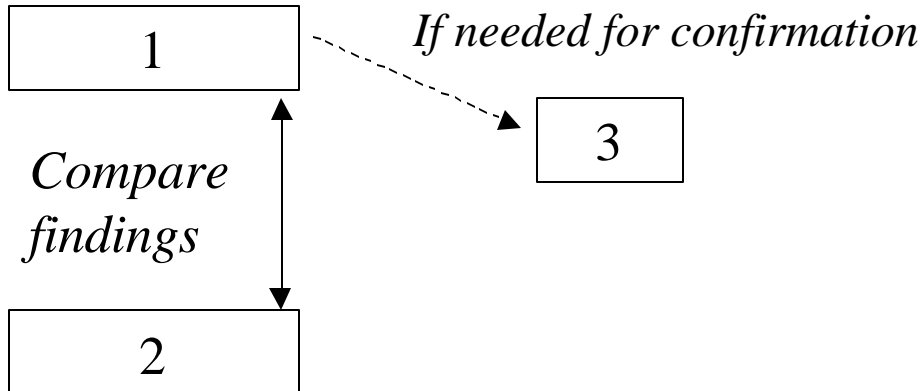  - Full-time for training, data collection, analysis

# Site Selection

- Study area(s) should represent the target population
  - ◆ An alternative is to focus on vulnerable groups

- If there are different ethnic groups within the target population, select an area representing each group.

- Location of the study area should be logistically feasible as long as it does not compromise representativeness

- Triangulate <u>within</u> each study area
  - ◆ Repeat data gathering activities in a second or third location of the same ethnic background
  - ◆ Purpose of this is to *confirm* what was learned in the first location within the study area
  - ◆ Since the purpose is confirmatory rather than explanatory, the amount of data-collecting activities needed is less than in the first location
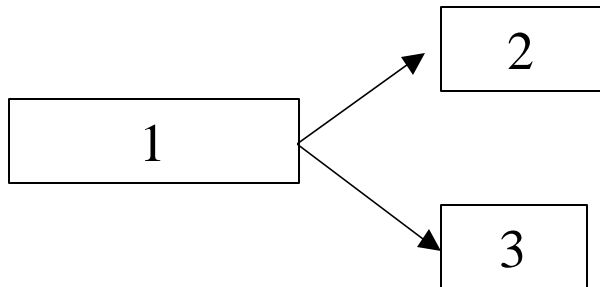
# Examples of Site Selection

**Example 1: 2 primary locations studied at the same time, with a possible secondary location for confirmation**

```
┌─────────────────┐
│        1        │ - - - -▶   If needed for confirmation
└─────────────────┘                    ┌───────────┐
         ▲                             │     3     │
    Compare                           └───────────┘
    findings
         ▼
┌─────────────────┐
│        2        │
└─────────────────┘
```

**Example 2: 1 primary location, 1 - 2  secondary locations studied later for confirmation**

```
                          ┌───────────┐
                    ▶     │     2     │
                   ╱      └───────────┘
┌─────────────┐  ╱
│      1      │
└─────────────┘  ╲
                   ╲      ┌───────────┐
                    ▶     │     3     │
                          └───────────┘
```

**Example 3: 1 primary location studied over time (for monitoring & evaluation or exploring new topics)**

```
┌───────────┐        ┌───────┐        ┌───────┐
│     1     │ ─────▶ │   1   │ ─────▶ │   1   │
└───────────┘        └───────┘        └───────┘
```
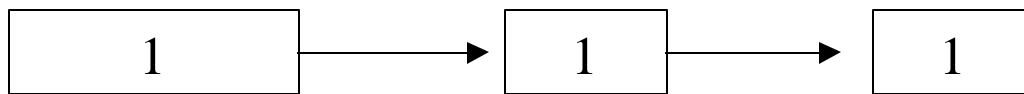
# Logistic Needs

(from Gittelsohn et.al. 1998, Freudenberger, 1998)

## Training:

- ◆ Flipchart paper and markers
- ◆ Optional (overhead projector & transparencies)
- ◆ Training reference materials for each participant
- ◆ Blank paper & data collection forms for practice
- ◆ Pens and pencils, notebooks

## Data Collection:

- ◆ Resources to 'live' in study communities
  - ◆ eating arrangements and clean water
  - ◆ sleeping arrangements and insect control
  - ◆ sanitation and washing arrangements
  - ◆ work area for discussions, mini-training, writing
  - ◆ if possible, generator and light for night work
- ◆ Small field notebooks for raw notes
- ◆ Composition books for expanded notes
- ◆ Copies of data collection forms
- ◆ folders, pens, markers, flipchart paper, cards, tape

## Data Management, Analysis, Report Writing

- ◆ Copy paper, file folders, markers, flipchart paper
- ◆ Copier, word processor or computer, printer

# Daily Activities in the Field

**(from Freudenberger, 1998: CRS RRA/PRA Manual)**

- Information Gathering Activities (2/3 day)
  - ◆ Interviews, group discussions, participatory exercises, observations, structured methods

- Team Interaction Meetings (1/3 day)
  - ◆ <u>Expanding notes</u> of data collection activities: interviews, discussions, observations
  - ◆ <u>Tabulation</u> of structured and semi-structured interviews, free listing, pile sorting
  - ◆ <u>Review</u> day's learning about <u>methods</u>/process
    - ◆ Identify <u>biases</u>
    - ◆ What was learned about methods
    - ◆ What would team do differently next time
  - ◆ <u>Review</u> day's learning about study <u>objectives</u>
    - ◆ <u>Content</u> of data rather than process of methods
    - ◆ What information do we have?
    - ◆ What information is missing?
  - ◆ <u>Plan</u> next day's activities
  - ◆ <u>Prepare</u> materials: Checklists, suggested phrasing of opening questions, structured forms, pile sort cards