

Why?

Qualitative research methods such as interview and focus groups are the best way to capture patient and staff perspectives and voice. They are useful for capturing insights into the 'story' or context behind quality improvement work and numerical measurement data. Surveys can also capture these data alongside other information.

How?

1. **Determine the purpose** – what are you trying to find out more about?
2. **Choose your sample size and participants** – How many and which people?
3. **Choose appropriate method: (may be a mix of methods)**
 - a. Surveys
 - i. Medium: Online/ Paper
 - ii. Transmission/Collection: In Person/Trusted Party/Email/Post
 - iii. Completion: Self-completed or assisted completion
 - b. Interviews
 - i. Unstructured – focus on a broad area
 - ii. Semi-structured – common set of questions with flexibility on order and follow-up
 - iii. Structured or focused – identical set of questions in the same order
 - c. Focus groups
 - i. A type of group interview seeking to generate discussion among the group
 - ii. Usually 5 to 13 participants (ideal = 6-8)
 - iii. 1-2 hour duration
 - iv. Can include tasks for the group to complete e.g. ranking a list etc.
4. **Determine questions or topic guide**
 - a. Questions which help answer your purpose
 - b. Consult subject matter experts
 - c. Determine if different questions are required for different participants
 - d. Determine if eligibility questions are required i.e. questions which include or exclude participants based on established criteria
 - e. Avoid leading questions i.e. Don't allow your wording to subtly encourage one answer or another e.g. 'What problems did you have with the process'
 - f. Use clear, simple, direct language
 - g. Be specific
 - h. Only ask one question at a time (check for 'and'/'or' in your questions), break up questions if necessary
 - i. Limit the number of questions to reduce analytic, administrative and respondent burden
 - j. Test questions with colleagues to ensure they are easily understood

For interviews and focus groups

 - g. Develop open questions to encourage discussion

For surveys

 - h. Include a 'I don't know, 'not applicable' or 'other' option
 - i. On scales include a neutral option, if possible
 - j. Include an open question (text box with free response) for any other comments
5. **Gain informed consent**
 - a. Provide information on the purpose of the survey/interview/focus group etc.
 - b. Explain how the data will be recorded, stored, used and who will have access
 - c. Provide an opportunity to ask questions and contact details so they can contact you at a later date
 - d. Gain documented consent to participate and for data use
6. **Gather data**

For interviews or focus groups

 - a. Invite participants to take part
 - b. Arrange interview or focus group at a time and location convenient for participants
 - c. Tape or video record where possible, take notes
 - d. As soon as possible afterward make notes of what you remember and things you would like to follow up with other participants

For surveys

- a. Distribute surveys using selected medium and transmission method
- b. Consider a pilot of the survey with a small group and make adjustments as necessary before scaling up
- c. Send reminders as necessary
- d. Collect and collate data

7. Analyse data

For interviews or focus groups – Thematic analysis

- a. Read through the data (notes/transcripts) to become familiar
- b. Make notes of your thoughts as you go
- c. Make initial codes for topics
- d. Refine codes as you progress
- e. Sort codes into groups or categories
- f. Refine into themes
- g. Write up your thematic analysis and illustrate themes using direct quotes

For Surveys

- a. Gather your data together electronically (online) or physically (paper)
- b. Enter data into a spreadsheet if required. Remember to give each participant a unique identifier (code or number unique to the participant)
- c. Examine data to check for incomplete data, errors or odd patterns of response
- d. Address errors and exclude respondents with unreliable or insufficient responses
- e. Using statistical software of your choice (e.g. Excel, SPSS etc.) create tallies (counts) or percentages for questions as required
- f. Consider the key messages you would like to communicate using the data
- g. Create charts e.g. bar charts, line charts or tables as required to convey your message
 - i. Use tables for comparisons, compositions or relationship analysis when there are only a few variables and data points
 - ii. Use charts when the message you wish to impart is about the shape of the data or when you want to show the relationship between many values
 - iii. Use bar charts to compare different values when specific values are important comparison and it is expected to look up and compare values between columns
 - iv. Use stacked bar charts to show composition (not more than 3-4 parts)
 - v. Use line charts if you have data over time
 - vi. Use pie charts sparingly, if at all and only for a maximum of 2-3 categories
- h. For open questions, use thematic analysis (as above) or use quotes to add context to the results
- i. Format your charts in a lean and clean manner
 - i. Lighten or remove lines
 - ii. Use bold/italics/underlines very sparingly
 - iii. Don't use or remove backgrounds, borders and special effects
 - iv. Lighten labels and direct label where possible (rather than legends or axes)
 - v. Always label your axes if present and annotate appropriately

When can I use these methods?

Ideally used at all stages of improvement interventions:

Conceptualisation: to inform the intervention objectives, identify issues; explore participant's previous experiences and motivations, to pre-test the intervention.

Implementation: to establish the degree of compliance to the intervention plan, to capture issues and changes as they occur.

Evaluation: to establish the degree of implementation fidelity, assess whether the key components of the intervention were implemented and to what extent, to explore change issues, identify contextual issues, investigate the barriers and facilitators to the change intervention, sustainability of the intervention, and the lessons learnt.

Which method should I use?

Interviews/ Focus Group

- I need in-depth information about a small number of questions from a small number of people (1-20)
- I have open questions
- I would you like to be able to ask follow-up questions and respond to the person I'm gaining information from
- I need context i.e. to capture the impact of culture, norms and interactions, or the impact of political, institutional, team or individual interactions on people's understanding of a situation or experience.
- I am looking for a story or a narrative around a set of circumstances or events
- I have access to skilled interviewers/moderators

For Focus Groups

- I would like to capture group discussion and dynamics
- I would like to capture less depth with more people

For Interview

- I would like to discuss sensitive topics
I would like to discuss in depth with fewer people

Survey

- I need to reach a large number of people (20+)
- I have multiple closed questions which are simple/short or multiple-choice/scaled or limited open-ended questions
- I don't need to ask follow-up questions
- I am seeking to describe or understand behaviour across a large population based on information from a sample
- I have limited time or budget
- I need to reach geographically dispersed people
- I have access to survey software or data entry/analysis expertise