

# Partnering for **Vaccine Equity**



Collecting Qualitative Data in Your Community (April 27<sup>th</sup>, 2023)



# Zoom Features

- Please stay on mute unless you are speaking.
- Live Spanish interpretation: Use the interpretation option in the Zoom toolbar (Globe icon)
- Use the Chat feature! Introduce yourself, submit a question for the speakers.
- Materials from this session will be shared broadly with the Learning Community through our website's library and the Adult Vax Program listserv
- **Technical problems?** Email [vaxequitylearning@urban.org](mailto:vaxequitylearning@urban.org)

# Today's Facilitators



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# Roadmap for Today's Training

- Role of Qualitative Data
- Data Collection Methods
  - Stakeholder Interviews
  - Focus Groups
  - Observations
- Pulling it All Together
- Discussion/Q&A



# Role of Qualitative Data

# Qualitative Data 101

## ***What is qualitative data?***

- Descriptive, conceptual, expressed in narrative form rather than numbers (i.e., quantitative data) to “tell a story”

## ***Why would someone use qualitative data?***

- Allows us to explore ideas, gather rich detail directly from individuals
- Answers questions of Why or How something happens
- Helps us think through complex systems and examine how programs and policies are working in real life
- Common uses include:
  - Evaluating programs/policies and guiding improvement
  - Improving user or customer experience (e.g., market or product research)

# Qualitative Data 101

## ***How are qualitative data collected?***

- Core approaches include:
  - Interviews with key stakeholders
  - Focus groups with people that have lived experience
  - Observations of settings, processes, and interactions

## ***What is the first step to collecting qualitative data?***

- Define your research question!
  - What data are you looking to collect?
  - Who do you want to collect data from?
- Your research question will guide the data collection methods needed

# Protecting Human Subjects in Research Projects

## ***What is an Institutional Review Board (IRB)?***

- IRBs conduct independent review of research studies to help ensure that research is ethical and participant rights and privacy are protected

## ***Do I need IRB review/approval?***

- Federal regulations require all research projects involving human subjects to be reviewed and approved by an IRB
  - Research = systematic investigation designed to develop or contribute to generalizable knowledge
  - Human subjects = living individuals about whom an investigator obtains (a) data through intervention/interaction with the individual or (b) identifiable private info
  - Special rules apply to research involving “vulnerable populations” (like children or incarcerated people)

## ***What projects DON'T need IRB review/approval?***

- Assessing one setting, program or community (not comparing across settings)
- Not designed to be generalizable to the larger community



# Qualitative Data Collection Experience (Poll)

- What types of qualitative data collection have you been involved with (either as a researcher or a human subject)? (select all that apply)
  - Stakeholder interviews
  - Focus groups
  - Observations
  - Another type of qualitative data collection
  - None

**Answer on the pop-up poll on Zoom!**

# Stakeholder Interviews

## When to Use Stakeholder Interviews

- Anticipate collecting detailed (potentially long) responses from individual participants about their single perspective
- Topic is private or sensitive, so individuals may prefer to share one-on-one (vs. in a group)
- Project resources support this approach (it takes longer)
- Flexibility is a priority (easier to schedule)
- Participant interaction is not a priority

# Developing Your Interview Protocol

- Create introduction section: explain who you are, why you are conducting interviews, how information gathered will be used
- Obtaining “informed consent” to participate: discuss benefits and risks to participation, steps you will take to protect confidentiality
- Organize your protocol questions in an intuitive order:
  - Interviewee background
  - Planning and design
  - Implementation
  - Successes and challenges
  - Lessons learned
- Individual questions should stem from overarching research question(s)
- Use open-ended questions; avoid questions with yes/no answers
- Keep questions neutral, don’t ask “leading” questions
- Length of protocol can vary depending on topic and subject

# Things to Consider when Planning Interviews

- How many interviews?
  - Range from 4-6 for a small project to 15-20 for a large project
- What kinds of “key informants” (or stakeholders)?
  - Obtain multiple perspectives
- How long will each interview be?
  - 30, 60, even 90 minutes depending on your topic and stakeholder
- What language will be used?
  - May need to engage translators, interpreters, or add’t interviewers
- How and where will the interviews take place?
  - Virtual or in-person?

# Interview Techniques

- **Study:** More familiarity w/ protocol = better interviewer
- **Discipline:** Follow the protocol, always ask core questions no matter how often previous informants have answered them, probe where appropriate
- **Flexibility:** Allow informant to “roam” when it’s giving you what you want, but reign them in when they get off track
- **Questions:** Should be clear, crisp, open-ended
- **Transitions:** Guide interviewee between sections and questions so the flow and sequence is understood and comfortable, not disjointed

# More Interview Techniques

- ***Be an active listener***
  - Maintain good eye contact, nod head to indicate understanding
  - Prove you're listening – no redundant questions, make connections b/w points made during interview
  - Reflect, paraphrase to confirm complex issues
  - Don't be afraid of silence
- ***Watch the clock***
  - Manage your time to get through protocol
- ***Have a backup plan***
  - Second team member prepared to jump in if/as needed

# Focus Groups



## When to Use Focus Groups

- Research question relates to consumers' (or program participants') thoughts, opinions, feelings, and experiences
- Group interaction is beneficial (i.e., people comparing experiences, exchanging anecdotes, viewpoints, opinions)
- Need to collect nuanced information from multiple people at once (may be more efficient than interviews)

## Developing Your Focus Group Moderator's Guide

- Brief introductory script: who you are, why you are conducting focus group, how results will be used
- Obtain informed consent
- Organize moderator's guide in an intuitive sequence:
  - Ground rules/Icebreaker/introductions
  - Experiences with program
  - Comparisons to other programs/prior experiences
  - Recommendations for program improvements
- Guide questions should map to overarching research question(s)
- Avoid yes/no questions; don't ask "leading" questions
- Moderator's Guides include fewer questions (e.g., 10 questions for 60-minute group) to permit time for discussion

# Things to Consider When Planning Focus Groups

- How many groups?
  - More than one, if possible
- How many participants per group?
  - 8 to 10 individuals for in-person; 4 to 6 for virtual
- How long will each group last?
  - Reserve 1.5 to 2 hours total (60-90 mins of which is discussion)
- What language will the groups be in?
  - May need translation/interpretation resources, or bi-lingual moderator

# More Things to Consider When Planning Focus Groups

- How will people be recruited for groups?
  - Engage a community partner, if needed
  - Should not be coercive, and avoid cherry-picking
  - Consider incentives (refreshments, gift cards)
- How and where will groups take place (virtual or in-person)?
  - Consider trade-offs (connectedness of in-person vs. accessibility of virtual)
  - If in-person: reserve a private space that is familiar, convenient, and large enough for comfortable, circular seating
  - If virtual: make sure participants have technical equipment and capacity to participate *before* the group

# Focus Group Moderation Techniques

- **Introductions** - Start w/ yourself and reveal something personal
- **Ground Rules** - Establish a clear, respectful, “safe” tone
- **Use Transitions** - Be clear what you’d like to talk about and why
- **Questions:** Use clear, crisp, and open-ended questions
- **Silence is Okay:** Don’t be afraid of silence or pauses; wait for participants to respond
- **Actively listen** – Make direct eye contact, nod your head
- **Reflect** on what’s being said, to clarify or emphasize a point
- **Involve everyone** – Work around the group naturally, unobtrusively

# More Focus Group Moderation Techniques

- **Pay attention** to nonverbal cues
- **Engagement** – Determine who is engaged and who is not
  - Look at everyone
  - Intentionally engage with those who seem disengaged
  - Gently draw in those who are not participating
  - But after trying a few times, don't keep pestering someone who simply won't participate
- **Control** – Politely, but assertively, re-direct away from someone dominating the conversation
  - Don't be afraid to reign things in if discussion gets too “rowdy”

## And One More Technique...

- Wrap up by summarizing the main thrusts of the focus group
  - Show the group that you've really been listening
- After asking, "*Does that sound about right?*" follow with,
  - "*What else? Is there anything important we haven't talked about? Is there anything someone wants to add?*"

# Observations



# When to Use Structured Observations

- To collect information on a setting, process, or interaction using a uniform, systematic approach
- Helpful for comparing how settings differ/processes are implemented across multiple sites (e.g., program intake)
- May or may not include program participants
  - But do not seek participant perspectives (no direct questioning)
- Can augment other qualitative data collection without much extra effort (e.g., observing a clinic waiting room prior to conducting a focus group or interview)

# Developing Your Observation Guide

- Use a form/checklist structure for easy notetaking, for instance:
  - *Seats available in clinic waiting room: YES or NO (circle)*
  - *Items discussed during patient visit: nutrition, sleep, stress, exercise (check all that apply)*
- Observations of interior spaces could include: signage/wayfinding, cleanliness, condition of facilities, capacity (crowded or not), languages of handout materials/posters, etc.
- Observations of built or surrounding environment could include: parking, public transportation, sidewalks/accessibility, and green space
- Observations of individual interactions (e.g., a doctor's visit) could include: topics reviewed, physical proximity of doctor/patient, length of visit, opportunity for patient questions/discussion

# Things to Consider When Planning Observations

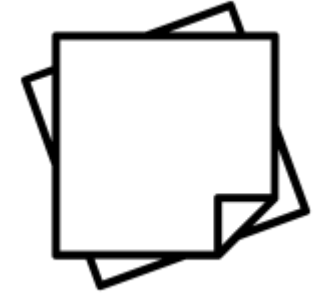
- Be as 'invisible' as you can be (don't ask questions!)
  - Consider using paper/pen rather than laptop or tablet
  - Request time after observation to ask questions
- Take pictures (with permission) of places and spaces if you can
- Consent is needed from all parties involved (e.g., providers, patients) if observing personal interaction like health care visit

Pulling it All Together:  
Synthesizing Qualitative Data  
from Different Methods

## In Summary

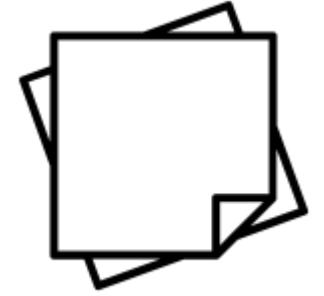
- Qualitative data are powerful for examining **why** and **how** something happens
  - Tells a rich, nuanced story and informs quantitative data analysis
  - Elevates the voices of people with lived experience
- Start with solid research questions, which will guide decisions about participants and methods
- Consider combining methods (triangulation) for the fullest picture
- Planning ahead is key (especially if IRB review is needed)

# Zoom Whiteboard Instructions



- Whiteboard will automatically show up on your screen
- Select sticky note icon in the task bar (left-hand side, sixth icon down)
- Choose note color, then use cursor to place your note and type an answer
- Use as many notes/offer as many responses as you would like!

# Whiteboard Questions



1. How are you feeling about using the qualitative methods we discussed today?
2. What ideas are percolating on how you might use qualitative research?

# Questions



# Satisfaction Poll & Upcoming Events

## Upcoming Learning Events:

### *Register NOW:*

- **May 2nd, 1 pm – 2 pm ET:** Vaccine Access After the End of the Public Health Emergency: What's Changing? What Isn't?
- **May 3rd, 12:30 pm - 1 pm ET:** P4VE Learning Community Member Orientation

### *Registration Coming Soon:*

- **May 10th, 12 pm – 12:30 pm ET:** Desk Yoga for the Seated Employee
- **May 17th, 12 pm – 1 pm ET:** SDOH Series – Neighborhood and Sleep
- **May 24th, 12 pm – 12:30 pm ET:** Mindfulness 101

**Full events calendar available on our website: [vaccineequity.urban.org](https://vaccineequity.urban.org)**

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