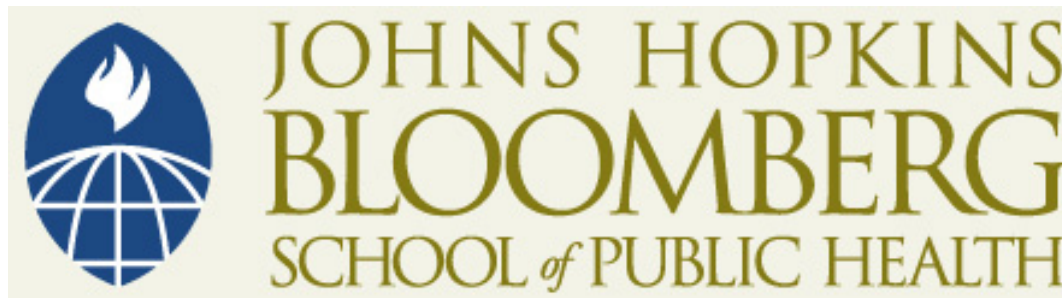


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# Training and supervising your research team

**Qualitative Data Analysis**  
**Class Session 13**

# Highlights

- ◆ Defining your role on the project
- ◆ Recruiting and hiring staff
- ◆ Staff training
- ◆ Staff supervision
- ◆ Quality Control
- ◆ Timeline/Budget

# Your role: data collector or supervisor?

- ◆ Benefits to doing data collection yourself:
  - Your skills/training in research methods
  - Your familiarity with the project goals
  - Allows you to be closer to the data
  - May enable a more flexible data collection process, e.g. spontaneous adjustment/departure from original field guide, as you see fit

# Drawbacks to doing your own data collection

- ◆ Your social distance from the community
- ◆ Your language skills
- ◆ Your physical distance from the community
- ◆ Volume of data collection may require more staff

# Scenario 1

- ◆ You are going to spend the next year in the field working on local understandings of malaria. You have developed the qualitative research plan, which will include both in-depth interviews with community members and focus groups with health workers. While the national language is French, the interviews with community members need to be conducted in the local language. The health care workers speak French though they are more comfortable in the local language. You are fluent in French, and moderately fluent in the local language.

# Scenario 1

- ◆ Decide whether you are going to hire and train an interviewer to collect the data, or whether you plan to conduct the in-depth interviews and focus group discussions yourself.

# How do you recruit and hire research staff?

- ◆ What are some ways to recruit staff?
- ◆ What qualifications should you look for?
- ◆ How many staff members should you hire?
- ◆ What categories of staff do you need?



# Recruitment

- ◆ If you are affiliated with an organization that has existing research staff, you may have to work them, and not hire new people
  - pros and cons
    - You will want to determine the pool of qualified candidates within the organization
    - Talk with colleagues in the organization to find out the quality of each candidate
    - Interview each candidate to assess skills

# Recruiting new staff for your QR

- ◆ Talk with organizations that have worked in the region before
- ◆ Determine if there are any research assistants available who have worked on other projects
- ◆ Solicit applications through newspaper ads and flyers
  - Post flyers at strategic locations
- ◆ Word of mouth through colleagues

# Recruiting new staff for your QR

- ◆ Depending on where research is based you may/may not get large pool of applicants
- ◆ Common situations:
  - large pool of applicants of the wrong type (many biologists/health workers; few social scientists)
  - Project officer or local organization has strong opinions on who to hire

# What qualifications do you consider when hiring research staff?

- ◆ Degrees & disciplines
- ◆ Prior research experience
- ◆ Availability and other commitments
- ◆ Language skills
- ◆ Communication skills
- ◆ Listening skills
- ◆ Writing skills
- ◆ Openness to learning new methods

# How to assess the qualifications of the candidates?

- ◆ Do an in-person interview, consisting of
  - Series of questions about background and experience
  - 10 minute mock interview with a semi-structured field guide
  - 20 minutes to write up notes from the mock interview
- ◆ Do a provisional hire and make final selection after the training period

# Benefits/drawbacks to recruiting members of the community

- ◆ Potential benefits:
  - Good to offer job opportunities w/in community
  - Mobilize community around research topic
  - Familiarity with appropriate greetings, terms of respect, communication styles
  - Can help you design appropriate recruitment strategies for research subjects
  - Can help you interpret findings from the research

# Benefits/drawbacks to recruiting members of the community

- ◆ Potential drawbacks
  - Too close to the community to be able to probe effectively
  - Assume they understand what is meant by terms and phrases
  - Participants may have concerns about confidentiality of information

# Benefits/drawbacks to recruiting clinically trained research staff

- ◆ Benefits
  - May be able to establish strong rapport, particularly if study is clinic-based
  - Usually very bright and well educated



# Benefits/drawbacks to recruiting clinically trained research staff

- ◆ Drawbacks
  - May not be able to break out of the mode of offering advice/information and just listen
  - There may be great social distance between clinic staff and participants
  - They may have trouble conceiving and describing the project as anything but health-related

# Recruitment dilemma

- ◆ Mary Otieno has applied to be a qualitative interviewer on your project. She has a degree in nursing, and 5-years of research experience as a survey interviewer. When you interview her she demonstrates good interpersonal skills. Yet when you ask her to do a mock interview with a field guide, her communication style changes and she becomes very serious and very standardized in her questioning. During the interview she also corrects the interviewee's understanding of some HIV transmission fact. Would you hire her for the position?

# How many staff members should you hire?

- ◆ Consider the following:
  - The budget
  - The amount of data to be collected
  - The time frame for data collection
  - Supervisory and management capacity
- ◆ Combination of narrow time frame and large number of interviewers makes iterative process of QR unattainable

# What are the different categories of staff that you may need?

- ◆ Research Coordination
- ◆ Data collection
- ◆ Transcription
- ◆ Translation
- ◆ Data entry
- ◆ Coding

# Benefits/drawbacks to staff members' filling multiple roles

- ◆ Benefits
  - The staff member is already familiar with the project goals
  - This may enable you to retain field staff on the project for longer period of time
- ◆ Drawbacks
  - It may be difficult for the staff member to switch roles from data collector to implementer to evaluator

# Training Research Staff

- ◆ Time for training
- ◆ Content of training
- ◆ Examples of training activities

# How much time should you allocate for training?

- ◆ Depends on:
  - Funds available
  - Your ongoing availability
  - Size of the staff
  - Your focus (skills vs. research theory)
  - How formalized/standardized it needs to be
  - How flexible you expect your research design to be

# Options for structuring the training

- ◆ Designated training time prior to data collection works well for:
  - Groups of trainees
  - Standardizing training across sites
  - Limited amount of time available
  - Situations when you may not be in the field all the time



# Options for structuring the training

- ◆ Ongoing training throughout data collection works well for:
  - Situations in which you are in the field all the time
  - Ethnographic studies that require flexible designs
  - Small group of interviewers
- ◆ Combination: designated training time plus ongoing training opportunities

# Training content

Exchange of knowledge:

- ◆ Give project rationale, goals, design
- ◆ Give key biomedical background on the problem
- ◆ Receive community geographic and social information

Exchange of skills:

- ◆ Give interviewing/observing skills using the project instruments
- ◆ Receive feedback/pre-testing data on project instruments

A two-way approach to training helps model negotiation and treating staff as consultants; staff get to practice same later on with community

# How much background do field staff need on qualitative research?

- ◆ Is it important for field research staff to be exposed to the history and disciplinary background of qualitative research methods?
- ◆ How might you be able to communicate some of this background to research team members in a way that is meaningful?
- ◆ If you had a limited amount of designated training time (i.e. 2 weeks) how much time would you dedicate to this background?

# Examples of training activities

Source:

- ◆ Project Accept Qualitative Assessment Training Manual, by Suzanne Maman and team (available on course plus)

# Closed vs. Open-ended Questions

Aim: Participants will be able to distinguish closed from open-ended questions and describe the advantages of open-ended questions

- ◆ Time: 30 minutes
- ◆ In this activity, participants will answer questions regarding several pictures
- ◆ Write the following questions on the blackboard:
  - Is the shirt red or yellow?
  - Are the shorts striped or solid?
  - Do you see flowers or trees?
  - Do you see flowers or trees?

# Rephrasing questions

- Aim: Participants will practice posing open-ended, non-judgmental questions
- ◆ Time: 45 minutes
  - ◆ Give each participant a list of closed or judgmental questions, and have them practice rephrasing questions to be open-ended and non-judgmental
  - ◆ Write each original question from the list on a sheet of newsprint, and hang the newsprint around the room
  - ◆ Have each participant write their rephrased questions on the newsprint
  - ◆ Discuss the participants' rephrased questions as a group

# Questions to rephrase

- ◆ Are you originally from this community? Were you born here?
- ◆ Do you enjoy living in this community?
- ◆ Are the HIV-risk behaviors in this community primarily related to heterosexual sex?
  - Why do you think that?
- ◆ Does “(local term)” mean “(translation)”?
- ◆ You use condoms, don't you?
- ◆ Why haven't you talked to your partner about using condoms yet?

# Planning for QC

- ◆ Qualitative research takes time, QC procedures add to that time but are vital
  - To ensure you aren't wasting the participants' time
  - To ensure the data you are gathering is usable for analysis
  - To ensure the iterative nature of qualitative research is maintained
  - To ensure researcher skills are constantly expanding and you are building capacity among researchers you are training/mentoring



# Technique 1: Read-throughs

- ◆ Gather your team of interviewers and set aside several hours to a whole day.
- ◆ Print out copies of interviews for everyone on the team, include at least one interview conducted by each team member.
- ◆ Read through each transcript out loud with one person playing the role of participant and one person playing the role of interviewer.
- ◆ As the transcript is read, team members comment on the interviewer's technique, pointing out probing and questioning techniques that worked well and where they did not.

# What constitutes good technique?

- ◆ Personal Qualities Displayed during the Interview
  - Did the interviewer create a conversational atmosphere?
  - Did the interviewer gain and maintain confidence and trust of the participant throughout the interview?

# What constitutes good technique?

- ◆ Effective Use of Participant's Time
  - Did the interviewer obtain an acceptable amount of information in order to achieve research objectives without frustrating the participant with repetition or monotony?

# What constitutes good technique?

- ◆ In-depth Interviewing Technique
  - Was the interviewer able to pose questions in an accurate, non-threatening, and neutral manner?
  - Did the interviewer listen to the participant's responses and use those responses to guide the flow of questions and probes?
  - Was the interviewer able to move between and among questions fluidly using the participant's responses as a guide?

# What constitutes good technique?

- ◆ Knowledge/Understanding of Interview Guide/Research Questions
  - Did the interviewer display understanding/knowledge of the interview guide or research questions?
  - Was the interviewer able to cover all research themes and use appropriate probes in a logical fashion?

# What constitutes good technique?

- ◆ Use of Appropriate Probing Techniques
  - Was the interviewer able to pick up on important information from the participant and probe accordingly?
  - Did the interviewer use appropriate number and type of probes to address the overall research questions?

# What constitutes good technique?

- ◆ Initiative

- Did the interviewer probe for new or emerging themes and independently contribute to the emergence of unanticipated themes?
- Was the researcher able to hear and act upon new and interesting research themes?

# What constitutes good technique?

- ◆ Overall Impression of the Interview
  - How successful was the interviewer in eliciting information pertinent to the research questions?
  - In which areas does the interviewer excel and in which areas is improvement needed?



# **Supervision of research staff**

# What are some aspects of successful supervision?

- ◆ Respect the research staff
- ◆ Trust the research staff
- ◆ Clearly communicate job expectations
  - Salary, length of contract, amount of time in the field, data collection tasks, etc.
- ◆ Identify consequences of failing to meet expectations
- ◆ Lead by example
- ◆ Recognize differences between your work ethic and work ethic in the organization where you are based locally

# How do you determine appropriate salary for field staff?

- ◆ Rely on judgment of your collaborator
- ◆ Understand the local salary structure
- ◆ Problems with over/underpaying staff
- ◆ Paying per interview versus salaried
- ◆ Consider the length of the contract

# Understanding local norms on firing research staff

- ◆ Understand firing policy before you begin
- ◆ Once hired never fired mentality
- ◆ Balance your standards for performance & accountability with local practices
- ◆ Documentation helps

# Staff management Scenario: Right side of room

In your project you have decided to offer a small financial incentive to participants in the FGs. The interviewers are responsible for distributing money to FG participants. One of the data entry clerks on the project confides in you that one of the interviewers fabricated the FG transcript in order to pocket the money for the FG.

What should you do?

# Staff management scenario: Center of room

You are working in an area of high HIV prevalence. Data collection on your project has been seriously hampered by staff who have to take leave to attend funerals of family members who have died from AIDS or other diseases. There are certain important cultural expectations regarding attending funerals of family members, even distant family in this setting.

What should be your policy regarding staff's funeral attendance?

# Staff management scenario: Left side of room

You are supervising a team of interviewers with two male colleagues. Your research team consists of 7 female interviewers. One of the interviewers confides in you that one of the male supervisors has started an affair with one of the female interviewers.

What should you do?

# Budget implications

- ◆ Staff training expenses
  - Hiring of locale and a-v equipment
  - Photocopying of training materials
  - Refreshments during breaks & lunch at mid-day
  - Staff *per diem*
- ◆ Staff salaries for each staff category
  - [Should transcribers/translators make more than qualitative interviewers?]
- ◆ Staff transportation to and from the field
- ◆ Stationary, tape recorders and tapes, if applicable