Qualitative Designs for Research and Evaluation

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Territory Acknowledgement



I would like to acknowledge that I'm living and working on the unceded and traditional shared territories of the Qayqayt and Kwantlen First Nations, and pay my respects to their Elders past and present.

Workshop outline

- Defining qualitative research
- What are the differences between qualitative and quantitative research
- Common types of qualitative research
- Qualitative study designs methodology
- Capturing data methods
- Qualitative analysis and report writing



Basic principles of research design

Four main features of research design, which are distinct, but closely related

- **Ontology**: How the researcher, views the world and the assumptions that makes about the nature of the world and of reality:
- Epistemology: The assumptions that you make about the best way of investigating the world and about reality Positivism/ Naturalism-Social Constructivism
- Methodology: The way that you group together your research techniques to make a coherent picture
- Methods and techniques: What you actually do in order to collect your data and carry out your investigations



Research Methods

- Research methods are split broadly into quantitative and qualitative methods
- Which you choose depends on:
 - your research question
 - your underlying philosophy of research
 - your preferences and skills



Quantitative vs. Qualitative Research Methods

Quantitative

- Close ended questionnaires, surveys, and checklists
 - Example: What is your race?
 - On a scale of 1-10, how severe is your anxiety?
- Large-scale data sets
- Random sampling
- Structured data

Qualitative

- Open ended questionnaires and surveys
- Focus groups
- Diaries
- Un-structured or semi-structured interviews
- Observations and field notes
- Case studies
- Drawings
- Videos

- Numerical 9, 16, 3.5
- Categorical
 - Nominal Sex, Language, Race
 - Ordinal Scale of 1-10, Very satisfied to Very dissatisfied
- Statistics, p-values
- Clean data

- Text visit summaries, office notes, interview transcriptions, journal entries
- Photos, videos, audio recordings, drawings, observations
- Narratives looking for a patterns

*Mixed Methods - Uses a combination of both



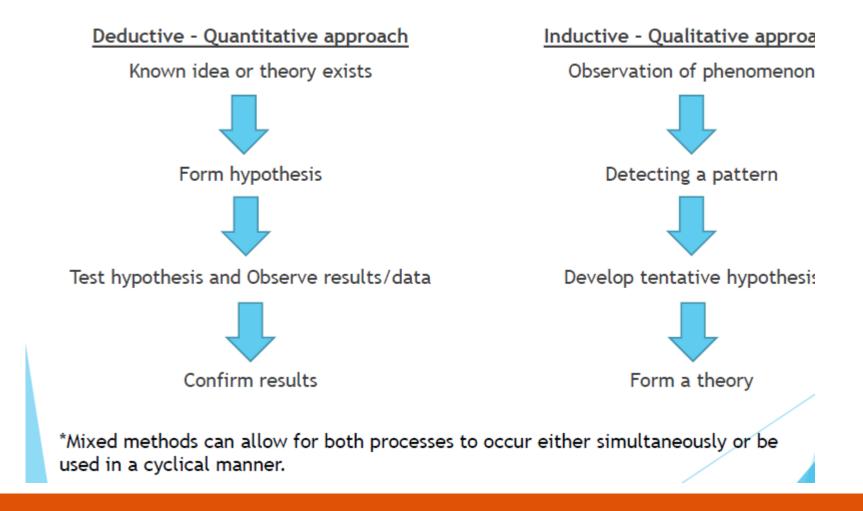


	Qualitative Research	Quantitative Research
Objective/Purpose	To gain an understanding of underlying reasons and motivations To uncover prevalent trends in thoughts and opinions	To quantify data and generalize results from a sample to the population of interest Sometimes followed by qualitative research to explore findings further
Sample	Small, focused	Larger number of cases representing population of interest
Data Analysis	Coding, looking for patterns	Statistical data, conclusive and descriptive findings
Example	Focus groups, interviews, group discussions	Surveys

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Deductive vs. Inductive Research Processes



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Strengths of Qualitative Research

- Gain insider perspectives into issues that are often missed (subtleties and complexities)
- Building relationships, causes, and effects, and dynamic processes surrounding issues
- Allows for ambiguities/contradictions in the data, which reflect social reality and duality behind many major issues
- Descriptive, narrative style which provides rich data





Limitations of Qualitative Research

- Lengthy and complicated designs, which do not draw large samples
- Validity of reliability of subjective data
- Difficult to replicate study because of central role of the researcher and context
- Data analysis and interpretation is time consuming
- Subjective open to misinterpretation



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When to conduct qualitative research

- Your research goal is to <u>explore</u> a topic or an idea
- You want to explore topics in more <u>breadth and depth</u> than quantitative research
- You want to <u>gain insight</u> into a target audience's lifestyle, culture, motivations, behaviours etc.
- You want to understand the reasons <u>behind</u> the results of quantitative research
- You want to get <u>input</u> from key informants or others



What kind of questions does qualitative research seek to answer?

Is concerned with the social aspects of our world and seeks to answer questions about:

- Why people behave the way they do
- How people experience an specific phenomenon
- How opinions and attitudes are formed
- How people are <u>affected</u> by the events that go on around them
- The <u>differences</u> between social groups



Sample research title and question for qualitative research(Exercise)

- How youth are affected by parental divorce?
- Exploring barriers to medication adherence among patients with diabetes: integrating perspectives of patients and health care providers
- Understanding barriers to health care access through cultural safety and ethical space: Indigenous people's experiences in Prince George, Canada

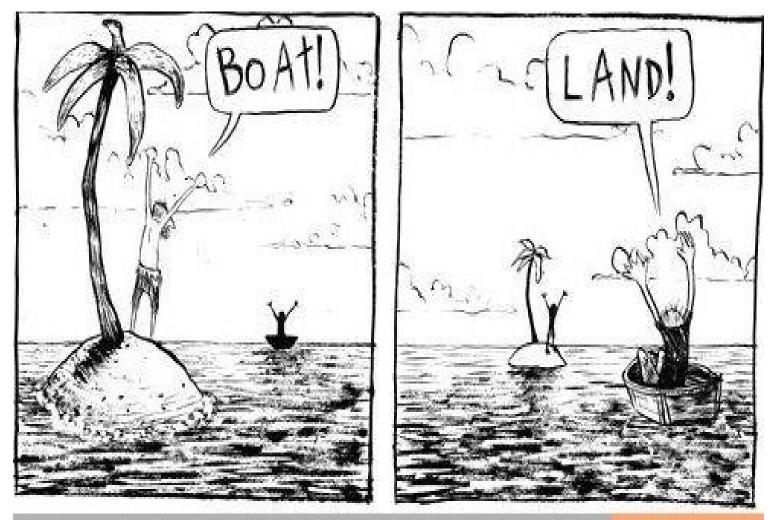






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🙂 ifunny.mobi

Reinvented by dlafarga for iFunny :)

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(Practice)Qualitative or quantitative?

A comparison of the effectiveness of drug A versus drug B in the treatment of migraine.	What are people's thoughts on the COVID vaccine requirements for travelers?	
An exploration of the role of the Practice Manager in		
the primary health care team: a study of four practices.	How does it feel to be a new comer to Canada?	
A descriptive study of school nurses' experiences of dealing with boys who have eating disorders.		
A national survey of patients' knowledge of the		
causes of heart disease.	How do people feel about the changes taking place on working mode after COVID?	

Taken from Hancock. 2002. An Introduction to Qualitative Research.



Methodology

- The philosophical framework
- The principles that guide research practice
- Explains why we use specific methods
- Often discipline specific
- Different methodologies will generate different types of knowledge, which are not always compatible
- The "why"

Methods

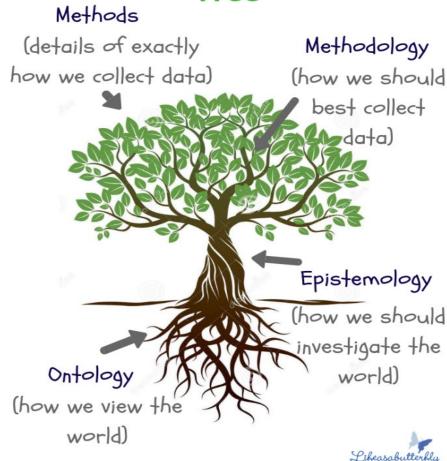
- Techniques ("actions") for gathering data
- The various ways of proceeding in gathering information
- Focus groups, interviews, observation, etc.
- Methods and how they are used are shaped by methodology

The "way"

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Research Methodology

Tree



https://tourismteacher.com/ontology-1/5/2024



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SAMPLING TECHNIQUES AND PROCEDURES IN QUALITATIVE RESEARCH

- The primary purpose of sampling is the selection of suitable populations (or 'elements') so that the focus of the study can be appropriately researched.
- Sampling in qualitative research is non-probability sampling

Tutorial Trigger You want to explore the experiences of carers who care for relatives with cancer. What initial considerations might you need to identify for choosing an appropriate participant sample?

Sampling data and data collection in qualitative research

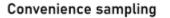
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evidence-based practice - Elsevier - due March 2020

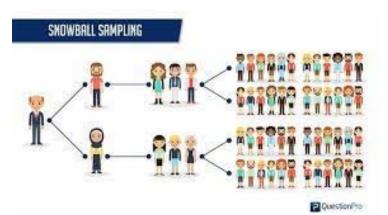


SAMPLING TECHNIQUES AND PROCEDURES IN QUALITATIVE RESEARCH









Theoretical Sampling



Point to ponder

The type of sampling chosen often depends on its ability to maximise the opportunity for producing enough 'rich' data to answer the chosen research question.

volve Tutorial Trigger If you wanted to explore the phenomenon of client-centred care, which sampling technique would/ could you choose?

Sampling data and data collection in qualitative research

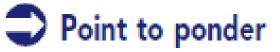
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Point to ponder

Whatever inclusion and exclusion criteria you use, you must always provide a rationale for both the sample and the inclusion/exclusion criteria.



Sample size in qualitative research should be adequate to achieve data saturation, richness of data and not too large that it is difficult to undertake in-depth, meaningful analysis.

Data Saturation

Sampling data and data collection in qualitative research January 2013, In book: Nursing & Midwifery Research: Methods and Appraisal for Evidence-Based Practice, Edition: 4th, Publisher: Elsevier – Mosby Editors: Zevia Schneider & Dean Whitehead <u>whitehead D & Ferguson, C (2020) - Co-authoring and co-editing Nursing and Midwifery Research: methods and appraisal for evidence-based</u> <u>practice - Elsevier - due March 2020</u>



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Туре	Phenomenology	Case Study	Grounded Theory	CPAR	Mixed Methods
Goal	Understand essence of (individual) experience	Highlight individual cases and/or relationship between; provide context to other data	Develop theory grounded in data	Seeks to understand the world by trying to collaboratively change it	To overcome limitations of a single methodology
Participants	Individuals who experienced a phenomenon of interest	One or more "cases"	Individuals, objects, documents	Community/ group, researcher, and other relevant parties	Individuals or groups
Sampling	Small (1-20)	One or several	Theoretical	Community/ group unit	Vary based on methods used
Outcome 1/5/2024	Multi format	Primarily text	Primarily text	Social change 27	Text and statistics

Grounded theory - methodology

- Suitable to the study of any behaviour that has an interactional element to it
- A set of <u>rigorous research procedures</u> leading to the emergence of conceptual categories
- Multiple analytic frameworks
- Term describes both a research "method" (a particular research process) as well as "outcome" (generates a theory grounded in data)



Grounded theory - methods

- Identify your area of interest
- Collect data
- Open coding
- Data collection, analysis, and emergent interpretation occur simultaneously.
- Writing memos: Writing down the hows/whys of your emerging codes
- Selective coding and theoretical sampling: Focus on core categories
- Sort memos and find theoretical code(s): Main code emerges
- Read literature



Grounded theory - methods

- The final outcome offers an explanation of the phenomenon under examination, and should be traceable back through the data.
- Can be used with either qualitative or quantitative data of any type (e.g. video, images, text, observations, spoken word, etc.)
- Commonly used both implicitly and explicitly in most qualitative research.



Examples

- A grounded theory of resilience experiences of women with gynecological cancer
 - European Journal of Oncology Nursing
 - <u>Volume 64</u>, June 2023, 102323
- Antalya Bilim University, Vocational School of Health Services, Antalya, Turkey
- Department of Obstetrics & Gynaecological Nursing, Faculty of Nursing, Akdeniz University, Antalya, Turkey



Community based, Participatory, and action research - methodology

- A partnership approach to research that equitably involves diverse community members, organizational representatives, and researchers in all aspects of the research process
- Seeks to understand the world by trying to change it, collaboratively and following reflection
- Goal is to increase and integrate the knowledge gained with interventions, policy, and social change to improve the health and quality of life of community members
- Not a unified body of ideas and methods but rather a pluralistic orientation to knowledge making and social change



Examples

- Realising radical potential: building community power in primary health care through Participatory Action Research
- Denny Mabetha, Temitope Ojewola, Maria van der Merwe, Reflect Mabika, Gerhard Goosen, Jerry Sigudla, Jennifer Hove, Sophie Witter, Lucia D'Ambruoso-
- International Journal for Equity in Health Volume 22, article number 94, (2023)
- <u>https://link.springer.com/journal/12939</u>



Patient-oriented research

- Similar to community-based research but with a specific focus on collaborative teams of patients, decision makers, health care providers, and researchers
- Engages patients as partners, focuses on patient-identified priorities, and improves patient outcomes
- Aims to apply knowledge generated to improve health care systems and practices
- Patients include anyone who has experience with the health care system or a health issue, including informal caregivers
- An approach that is applicable to both to qualitative & quantitative health research



Examples

- Researching what matters to improve chronic pain care in Canada: A priority-setting partnership process to support patient-oriented research.
- Poulin, P., Shergill, Y., Romanow, H., Busse, J. W., Chambers, C. T., Cooper, L., ... & Lalloo, C. (2018).
- *Canadian Journal of Pain, 2*(1), 191-204.



Mixed methods - methodology

- Involves collecting, analyzing, and integrating (or mixing) quantitative and qualitative research (and data) in a single study or a longitudinal program of inquiry.
- Data need to be "mixed" in some way so that together they form a more complete picture than when alone.
- Need to address productive tensions between methods (actions) and methodologies (underlying philosophy).
- Encourages collaboration between professions and disciplinary fields.
- Increasingly popular in health care research.



Examples

 Hudon, C., Chouinard, M. C., Dubois, M. F., Roberge, P., Loignon, C., Tchouaket, É., ... & Bouliane, D. (2018). Case management in primary care for frequent users of health care services: a mixed methods study. *The Annals of Family Medicine*, 16(3), 232-239.



Data collection/Method types

- Interviews
- Focus groups
- Document review
- (Participant) observation
- Triangulation



BENEFITS	LIMITATIONS		
 Allows participants to express their own ideas Allows interviewer to be responsive to individual differences and situational circumstances 	 Minimal control over the order in which the topics are covered Usually small sample size limited due to cost and time 		
 Allows organised discussion structured in a flexible way Provides opportunity for all to participate and give their opinions Dominant and submissive participants can be directed and controlled Discussion generated between participants Large quantity of information collected in a short amount of time 	 Researcher has less control over the flow of discussion Facilitating focus group interviews requires considerable skill Difficult to distinguish between individual view and group view More difficult to organise and order data for analysis 		
 Allows researcher immersion and prolonged involvement with participants Encourages free and open conversation with the participants 	 Altered behaviours of observed groups by the presence of the researcher Takes time to build trust with participants 		
 Reveals descriptions of behaviours by stepping outside the group Allows identification of recurring patterns of behaviours that participants may be unable to recognise or reveal themselves 	 Potential researcher bias in the design of a study Sources or participants may not be equally credible Analysis of observation can be biased 		
	 Allows participants to express their own ideas Allows interviewer to be responsive to individual differences and situational circumstances Allows organised discussion structured in a flexible way Provides opportunity for all to participate and give their opinions Dominant and submissive participants can be directed and controlled Discussion generated between participants Large quantity of information collected in a short amount of time Allows researcher immersion and prolonged involvement with participants Encourages free and open conversation with the participants Reveals descriptions of behaviours by stepping outside the group Allows identification of recurring patterns of behaviours that participants may be 		

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Interviews

- Informal: Researcher is required to recollect discussion
- Unstructured: Researcher allows interview to proceed at respondent's pace and subjects to vary by interviewee (to an extent)
- Semi-structured: Researcher uses an interview guide, but respondent is given freedom to respond
- Structured: Researcher uses identical situation and adheres to interview schedule



• Thinking about:



Tutorial Trigger What might be the features of a 'desirable' environment for the conduct of qualitative interviews?



Focus groups

- A group of interacting individuals having some common interest or characteristics, brought together by a moderator, who uses the group and its interaction as a way to gain information about a specific or focused issue
- Useful in understanding how or why people hold certain beliefs about a topic or program of interest

Point to ponder

Focus groups are small, structured groups with selected participants led by a moderator. Focus groups are specialised groups in terms of purpose, size, composition and procedures. Interaction in focus groups is important with an element of flexibility and adaptability designed to obtain the best results (Litosseliti 2007).

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Focus groups/Interview Tips

- Do know your guide
- Do ask open ended questions
- Do leave your assumptions at the door - You know nothing!
- Do take notes
- Do validate and empower
- Do maintain eye contact
- Do rephrase questions
- Do Probe Probe Probe!

- Don't ask closed questions
- Don't interrupt/tell your own story
- Don't lead/put words in their mouths
- Don't judge
- Don't be afraid to re-direct
- Don't be afraid of the silence

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Developing your qualitative interview/focus group guide

- The interview guide is <u>a guide</u>
 - Typically qualitative visits are unstructured or semi-structured
 - Does not need to be read verbatim
 - Interviewer needs a very good understanding of the research question and probe
 - Create a certain amount of order on topic areas that your question covers and then follow in a reasonable order (but you can jump around depending on how the participant leads the conversation)
 - Types of questions
 - Background
 - Behaviors or experiences
 - Opinions or beliefs
 - Knowledge
 - Sensory experiences
 - Focus on research question and formulate questions that are concretely oriented to answer to it (but avoid specific questions)
 - Use language that is relevant and understandable to participants



Open ended vs. Closed ended Questions

Example: Study looking at how experiences with stigma affect people with mental health conditions

<u>Closed ended question -</u> All participants answer same questions for comparisons Have you experienced stigma? Yes, No

Does stigma affect your decision to seek care for your mental health condition?

<u>Open ended question</u> - Participants respond in their own words How has your experience with stigma affected your daily functioning?

Please describe how your experience with stigma has affected your decision to seek care for your mental health condition

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DON'T lead/put words in their mouths

Example: Study looking at differences in parent and child attitudes surrounding social media

Participant: Sometimes my mother and I fight when I want to go on Facebook. Interviewer: So tell me more about how you hate your mother.

VS.

Participant: Sometimes my mother and I fight when I want to go on Facebook. Interviewer: Can you describe more about what you and your mother fight about?





DO Take Notes

- One important piece of the interviews are the notes, observations, or memos that the interviewer/researcher marks down
- Notes should be used more for contextual information rather than content
 - Example: Participant is teary-eyed at this question, participant is agitated, participant avoids eye contact, participant tenses up and rocks back and forth. Anything that would not be captured on the audio recording (e.g. body language)

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- You do not need write down everything the participant says
- Take notes both during study visit and analyses

One important thing to remember: Qualitative data is transcribed verbatim!

One limitation of qualitative is it can be easily misinterpreted

For example: These kids are driving me crazy.

The tone/impression of the statement changes depending if the participant is speaking in a sad, angry, or joking manner. Notes and memos are very important!





DO Probe

In a quantitative survey collection, the data is what it is.

Over the last two weeks, how often have you been not able to stop or control worrying?

Not at all Several days More than half the days Nearly everyday

- In qualitative, you can probe for more context (e.g. what they've been unable to stop worrying about, how that's affected their everyday functioning, how does the worrying manifest?)
- > You can probe depending on where the participant is leading you
- Probes can include Who? Why? When/In what circumstances? How did it feel (physically, emotionally)? Severity? How do you feel now? How often were you experiencing it? How much did it impact your daily life? How did friends/family/community react?





(Participant) Observation

- Anthropology: To gain a close and intimate familiarity with a given group of individuals and their practices through an intensive involvement with people in their cultural environment, usually over an extended period of time (no problem!)
- Useful for "thick description": The detailed account of field experiences in which the researcher makes explicit the patterns of cultural and social relationships and puts them in context
- Fieldnotes: The systematic description of events, behaviors, and artifacts in the social setting chosen for study (it's messy!)



(Participant) Observation

- What kind of observer will you be? (passive, moderate, active)
- Challenges: Boundary blurring, impression management, need for personal reflexivity, "front stage" behaviour, ethical considerations, time commitment, can be/feel overwhelming



Complete Participant

- Researcher is immersed in group/community (complete intervention)
- · Research is usually concealed (covert)

Participant as Observer

- Researcher steps into and out of groups/ community (intervention)
- Research is known (open)

Observer as Participant

- Researcher mainly observes but occasionally enters field (brief intervention)
- Research is known (open)

Complete Observer

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- Researcher does not participate
- Research is either known (open) or concealed (covert)

Figure 7.1 Different roles of the observer in observational research

Devise an observation schedule for observing chronically ill children on a paediatric ward. What type of observer/participant role/s would you employ? What might you expect to observe?

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Triangulation

- Analyzing a research question from multiple perspectives is to arrive at consistency across data sources or approaches
- Combining multiple observers, theories, methods, and empirical materials, to overcome the weakness or intrinsic biases and the problems that come from single method, single-observer and single-theory studies
- Used in both qualitative and quantitative research design



Qualitative Data Analysis

- The range of processes and procedures whereby we move from data that have been collected into some form of explanation, understanding, or interpretation of the people and situations we are investigating
- Analysis based on an interpretive philosophy.
- Idea is to examine the meaningful and symbolic content of qualitative data.



Analysis

• Deductive approach

- Using your research question to group the data then look for similarities or differences
- Used when time, resources are limited (and dependent on methodology)

Inductive approach

- Using emergent framework to group the data and then look for relationships
- "Tacking back and forth" between approaches



Points of analytic focus

- The primary message <u>content</u>
- The <u>attitude</u> of the speaker
- Whether content is meant to represent individual or groupshared <u>ideas</u>
- The degree which content/speaker is representing actual vs. hypothetical <u>experience</u>



Trustworthiness/Rigor in qualitative research

Criteria	Issues	Solutions
Credibility (= internal validity)	"Truth" value	Prolonged and persistent observation. Triangulation, peer debriefing, member checks, deviant case analysis
Transferability (= external validity)	Applicability	Thick description, referential adequacy, reflexive journal, saturation
Dependability (= reliability)	Consistency	Dependability audit, reflexive journal
Conformability (= objectivity)	Neutrality	Conformability audit, reflexive journal

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Terminology

- Coding: The approach of attaching labels to lines of text so that the researcher can group and compare similar or related pieces of information.
- Characteristic: A single item or event in a text; smallest unit of analysis
- Themes: Idea categories that emerge from grouping of lower-level data points
- Theory: An interrelated set of concepts, definitions and propositions that present a systematic review of events or situations by specifying relations between variables



Guidelines - coding and developing analysis

#1 Focus

#2 Steps

- Attitudes
- Emotions
- Ideas
- Words
- Relationships
- Themes

- Read through first
- Sentence coding
- Organize your codes
- Share with partner
- Refine codes

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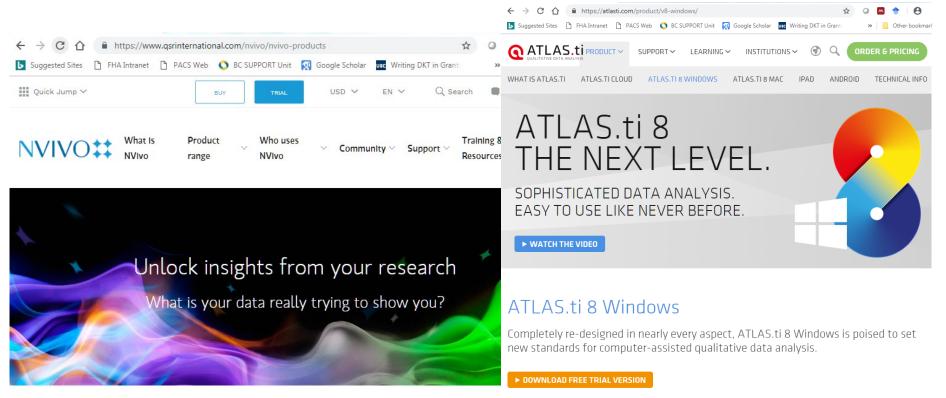


Analytic software

- It is possible to conduct qualitative analysis without software
- Start with a manual coding for the first few transcripts
- Can be used in all phases of data collection, analysis, and reporting



Examples of analytic software



Home > NVivo > NVivo Products

Connecting the dots in your data is faster, easier and more efficient with NVivo. More than just a tool for organizing and managing data, NVivo helps you think differently about your research, uncover more and back it all up with rigorous evidence.



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NVivo screen shot

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Qualitative reporting – who, why, what, where, & how

Focus

- Academic: Conceptual framework/theories, methodology and interpretation
- Practitioners: Concrete suggestions for better practice, policy recommendations
- Lay readers: Problem solving, reform on practice/policy

Format

- Research report
- Academic journal article
- Report to donor
- Evaluation report
- Community capacity building
- Non-traditional
- Multi-media

Ethics

- Main obligation: To ensure they are <u>well-informed</u>
 - Purpose, risks and benefits, expectations of participation, how results will be used, reporting back, ownership of data
- Non-coercive (e.g. captive and/or vulnerable populations)
- Need to examine historical, political, economic and cultural aspects of you and your participants
- Work for mutual benefit of all



When in doubt – ask & collaborate

• Fraser Health's Department of Evaluation and Research Services at: <u>http://research.fraserhealth.ca/about-us/contact-us/</u>



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