A Recipe for Success: Lessons Learned for Using Qualitative Methods Across Project Teams

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Presentation Overview

- Our Background
- Our Recent Experience
- Lessons Learned
About Our Center

- Public health research and evaluation center
- Private and public funding
- Several large initiative-level evaluations
- Learning organization with a number of students and young professionals
- Majority of projects utilize a mixed methods approach
Why Qualitative?

- Part of a broader tool box for evaluation

**Strengths**
- Puts participants’ experiences in their own words
- Adds context to the program’s “story”
- Complements quantitative data

**Challenges**
- Time consuming
- Large amounts of data
- Perception of subjectivity
Our Recent Experience

- Four evaluation projects focusing on:
  - Obesity prevention
  - Tobacco prevention and cessation
  - National Tobacco Control Networks for Priority Populations
  - State tobacco control programs

- All in qualitative phase at same time

- Young staff with limited experience in qualitative methods
Our Approach
Our Approach

Feedback

Instrument Development → Data collection → Management & Analysis → Reporting & Dissemination

Training
Planning

- Conduct formal trainings
- Facilitate “learning groups” across projects
- Assign experienced leader in qualitative methods to each project
- Share templates and resources across projects
Instrument Development

- Limit duplication of efforts
  - Make templates & examples easily accessible
  - Take time to share with teams

- Collect realistic amount of data
  - Evaluation questions drive interview topics
  - Kept focused on primary questions
  - Complements quantitative data
Data Collection: Interviewer Training

- Start as notetakers, assistant moderator
- Encourage listening to recordings
- Practice interviews
- Teams with mix of experienced and beginner
Data Collection

- **Consistency across interviewers**
  - Limited the number of interviewers/project
  - Developed a script for all interviewers to follow
    - Made sure it is conversational
    - Prioritized interview questions
    - Discussed the type of information needed for each question
Data Collection (continued)

- Consistency across interviewers (con’t)
  - Practice
    - Role playing
    - Reading script aloud
  - Debrief after interviews
    - Take field notes
    - Identify initial themes
    - Discuss ways to improve interview
Data Management

- Outsource transcription

- Use common qualitative software across projects
  - Assign one person/project responsible for management
  - Provide software training
  - Purchase limited number of licenses and use across projects
Analysis

- Develop a codebook
  - Provides consistent guidance
  - Create initial codes based on evaluation questions and/or theoretical framework
  - Test and review codebook as a team, make sure everyone understands what is written
Consistent coding by multiple coders

- Train on a subset of transcripts

- Check inter-coder reliability
  - Degree to which coders assign the same codes to the same text unit

- Once achieve acceptable reliability, allow for coders to work on their own
Analysis (continued)

- Analyze in pairs
  - Code individually and then compare
  - Use report themes in a consistent manner

- Regular team check-ins about findings and process
Reporting & Dissemination

- Discuss the “story” of findings
- Develop report template
- Identify one person overseeing layout
- Ensure take home messages are clear
- Stakeholder input is critical
Summary
Summary

- Take the time to assess your team’s capacity
- Foster collaboration across projects
- Utilize existing resources and experience
- Provide regular feedback and opportunities to share
- Engage stakeholders throughout process
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