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Graduate student research manual: Focus groups and interviews

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GRADUATE STUDENT RESEARCH MANUAL:

FOCUS GROUPS & INTERVIEWS

Prepared by:

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Disclaimer

This manual is largely based on this previously released publication:

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Abstract

This manual is a practical training guide for Masters of Education students (referred to graduate-student researchers) in the Werklund School of Education, University of Calgary. It may also be applicable to students working in other fields or institutions. The purpose of this manual is to support graduate-student researchers on how to plan and conduct focus groups and interviews for qualitative research in the field of education. This manual is evidence-informed and includes additional references for researchers and research assistants to further develop their understanding of how to work successfully on a qualitative research project that collects data through focus groups.

Keywords: graduate-student researchers, training manual, qualitative research, focus groups, interviews

Introduction

The purpose of this document is to provide information to graduate-student researchers on how to conduct focus groups or interviews for purposes of collecting qualitative research data in the field of education. It also provides information on institutional requirements, such as ethics, as well as logistics and related information. Though it may have applicability in other disciplines or contexts, this guide has been specifically prepared for professional graduate-student researchers in the Werklund School of Education, University of Calgary.

Overview of The Research Project

Research projects involve several steps, starting an idea and then developing that idea into a project. Here is an overview of what a typical project might involve:

1. **Idea Incubation** – This starts with a concept or problem of practice that a researcher (in this case, you) thinks is worth exploring. This is the pre-proposal stage where broad ideas are sometimes introduced to others for general feedback. This helps you further develop those ideas so they are concrete enough for a proposal.
2. **Proposal** – This is a general plan for what a researcher wants to do for his or her project. For example, students can prepare a proposal for an inquiry studying their own practice, designing an educational solution or developing an innovative approach to learning. The proposal generally includes a literature review, methodology, a timeline and a justification for the research is worth doing.
3. **Ethics** – Any project involving the use of animal or human research participants requires ethics approval from the institutional research ethics board (REB). This is an important step in the process as many subsequent steps in project rely on receiving approval from the REB. In education, research projects are reviewed under the Conjoint Faculties Researcher Ethics Board (CFREB). Graduate-student researchers should check with their course instructors about getting ethical approval for course-based research. Graduate-student researchers should check with their academic program coordinators about getting ethical approval to conduct research that involves publicly sharing the results of the research.
4. **Recruit Research Participants** – Participants are sometimes referred to as “informants”, “key informants”, “research subjects” or “research participants.” For the purposes of simplicity, this training manual uses the term “participants”.

5. Typical ways of recruiting participants include e-mail recruitment or posters. The steps for recruiting individuals to participate in the project must be approved by the REB as part of the ethics application. Appendix E provides a recruitment template that can be adapted by graduate-student researchers.
6. **Gather Data** – A research project may involve more than one method of collecting data (e.g. focus groups and surveys). The guidelines covered in this manual pertain only to focus groups and interviews. Course based ethics clearance permits graduate –student researchers to conduct interviews and/or focus groups.
7. **Analyze Data** – Once data have been gathered, they need to be analyzed. The first step is usually to transcribe the recordings. After that, you will begin to analyze the transcripts using a process called "coding." This involves identifying, organizing and sorting key themes that emerge from the data. This step of the project is likely to take a significant amount of time.
8. **Write Up Results** – Once the data have been analyzed, you are ready to share what you found. This is generally referred to as "disseminating the results of the research." For MEd students, this almost always takes the form of a final paper in your Collaboratory of Practice course.

Overview of Interviews and Focus Groups

Interviews are one-on-one conversations with a research participant. Focus groups are also called "group interviews" or "group conversations" The objective is to gather qualitative research data from human research participants. The kind of data collected in interviews and focus groups usually relates to the participants':

- Beliefs
- Perceptions
- Opinions
- Views
- Values
- Experiences

For focus groups, two criteria make these group discussions "focused":

- A clear and defined topic

- A common set of characteristics among participants (e.g. demographic, professional or other commonalities).

Both interviews and focus groups are comprised several elements: (1) the researcher; (2) the research participant; and (3) a set of questions to guide the conversation; and (4) a recording device.

Regardless of whether you are conducting an interview or a focus group, you will spend time organizing and scheduling your data collection. Participants will be advised in advance of the date, time and location.

Duration

We recommend that your interview or focus group last for a maximum of 60 minutes. If you think it is likely to last more than 60 minutes, either plan a break or schedule another meeting. Participants will likely be restless, tired, or hungry and may not want to continue.

Location

Choose a location that is both safe and convenient.

We recommend that for interviews you meet participants in a quiet, neutral location, such as a meeting room at the university, work place or school. We do not recommend or endorse that you meet research participants in their private homes, vehicles or any location where you, as a researcher feel vulnerable or unsafe.

A focus group is usually located in a place that lets people feel at ease, in an environment that allows people to be heard by each other, the facilitator, and the recorder. The graduate-student researcher must ensure that every participant’s contribution is being captured for future data analysis. Focus group discussions are usually recorded via a digital recording device for later transcription and data analysis.

Focus Group Size

Focus groups vary in size, with a maximum usually being 12 to 15 people. It is recommended focus groups include a maximum of eight (8) participants for MEd graduate research projects. The larger the group, the more challenging it can be to moderate.

Ethics

All projects conducted at the University of Calgary involving human participants must be approved by the Conjoint Faculties Research Ethics Board (CFREB). Approval for the study is obtained before participants are recruited or focus groups occur. The project primary investigator (PI) will prepare and initiate the application to the CFREB. If conducting a course-based research project, graduate-student researchers will submit an ethics application to the instructor for approval. If conducting a research project that will involve publicly sharing findings beyond course work, the graduate-student researcher should consult with the academic program coordinator to complete an ethics application for CFREB approval. The academic program coordinator will be listed as the PI for the research project and graduate-student researcher will be listed as a member of the research team.

As a graduate-student researcher, you must be an approved member of the research team, according to CFREB regulations. This will mean completing an ethics tutorial that is required of all researchers in Canada called the Tri-Council Policy Statement: Ethical Conduct of Research Involving Humans, 2nd edition (TCPS 2) Tutorial Course on Research Ethics (CORE). Upon completion of the tutorial, you will be issued a certificate in .pdf format. Save your certificate on your computer using a file name you will remember.

You must register with the University of Calgary's Institutional Research Information Services Solution (IRISS). Uploading a copy of your certificate of completion of the TCPS2 CORE Tutorial will be part of that process. You will not be permitted to participate in focus groups or have any contact with research participants until you have been formally added to the research study team.

Once you have been approved by the REB as part of the research team, you should be able to see the entire ethics application online, including a copy of the approval certificate for the research project. You may want to download a copy of the approval certificate in case you ever need it. If you are conducting a research project under the course-based ethics approval, your instructor can provide you with a copy of the approval certificate for the course.

Focus Group or Interview Questions

As a graduate-student researcher, you will need to write a few questions (5-10) to guide the focus group or interview so that they are unbiased and purposely do not try to “lead” participants into giving a particular answer. Well-written questions are exploratory and open-ended, as they are intended to allow participants to share their ideas, thoughts and beliefs without judgement or influence. Well-written questions are free from jargon or complicated technical terms. They also avoid inflammatory or emotional language.

When you are conducting a focus group or interview it is important to adhere to the approved questions.

Participant Recruitment

The steps involved in recruiting participants, as well as any recruitment materials (e.g. posters, brochures or even e-mail invitations) must also be approved by the institutional research ethics board. Recruitment cannot begin until ethics approval has been obtained. A sample recruitment template is provided in the Appendix E.

Planning Your Data Collection

In addition to developing the research questions, recruiting participants and receiving ethical approval to conduct the research, there are numerous logistical elements involved in conducting research. (See the checklists included as Appendices.)

Room or Venue Booking

It will be up to you to secure a venue. This might include obtaining information about venue availability and logistical information about how the venue might need to be booked.

If the focus group is being held on campus, the protocol to book rooms may involve certain institutional privileges. You may need to work with a member of the administrative staff to book a room or he or she may book the rooms directly.

Communications Protocol and Cell Phone Use

On the day of your interview or focus group, be discreet and judicious with your phone. Keep your cell phone on, but at least 10 minutes participants arrive, turn your phone to silent mode. During data collection, do not use your phone for any purposes not related to the research except in the case of an emergency. By this, we are talking about a real emergency, not social calls.

Ensure that someone you trust knows where you are at all times, particularly if you are meeting research participants at a venue you have never been to before.

Recording the Focus Group or Interview

Focus groups and interviews can be recorded in one of three ways, using audio, video or field notes.

It is probable that a video or audio recording will provide the primary source of data for analysis. Note-taking is usually considered a secondary or back-up way to collect data. Ideally, you want to capture data in more than one way (e.g. recording and field notes). If you are recording a session, it is not unusual to have both a primary and a back-up recording device in case one fails or a recording is accidentally erased. (This can happen more easily than you might think.)

The institutional ethics review board must approve the type of recording(s) that can be used on a project. You must adhere to the institutionally approved methods for recording your focus group. For example, if you have not been approved video record your focus group, do not do so. For MEd course-based research, approval has been granted only for audio recording.

Audio recording – If you are audio-recording your session, use a high quality digital voice recorder. and have a back-up- recorder available. Do not use your personal mobile device (e.g. phone or tablet) to audio record focus groups unless you have explicit permission to do so from the ethics review board. Practice setting up and using the audio recording device before the focus group runs. Ensure there is a memory card or other approved data storage. Also, be sure you have extra batteries for the device.

Keep any recording devices running until the last participant has left the room. That way, if there are any stragglers who want to make contributions after the main conversation has concluded, you can still capture their input with the recording device.

Field notes – You may take notes throughout as a secondary source for data analysis. Be sure to include the following information in your field notes:

- Date and time of the focus group / interview
- Location.
- Names of participants / pseudonyms

See Appendix D of this guide for a helpful template that can assist you in taking notes.

Remember that your field notes become part of the permanent element of the data collection for the research project. Here are a few tips to help you produce high quality field notes:

- Write out complete words. Avoid using short-hand or “texting” shortcuts such as “R” instead of “are”.
- Write out complete sentences. Avoid bullet points and sentence fragments.
- Use quotation marks to denote direct quotations from participants.
- Use brackets or square brackets to indicate editorial or additional comments such as laughter, gestures, body language, etc. Limit the amount of editorial comments you record. Your primary goal is to objectively capture what the participants said and did during data collection.
- Avoid vague indicators such as “he said…” and instead use names, pseudonyms or research participant numbers, as per the project protocol.

Try to be as specific as possible with your notes. Unless you are a highly-skilled and experienced note taker, do not expect to be able to write out every word that is said. Capture the main ideas in complete sentences. The more practice you get taking notes during focus groups, the easier it will become.

You can ask participants to slow down if they are talking too quickly or ask for clarification if you having a hard time taking notes on what someone is saying.

Focus Group or Interview Room Set-Up

Ensure the room is set up so everyone can see each other. The objective is to create an environment where people feel free to exchange ideas and have a conversation.

Set out refreshments (i.e. water jug/ glasses) before everyone arrives if needed. Graduate-student researchers are not provided with any funding for hospitality expenses through their course work.

Ensure the trash can in the room is lined with a garbage bag. You will remove any garbage left in the room after the focus group ends and it is easier to do this if you have already lined the trash can with a bag before the focus group starts.

Facilitating a Focus Group Discussion or Interview

Facilitating a focus group is also sometimes called “moderating.” Regardless of the name it goes by, leading a focus group discussion requires skill and acumen. The Facilitator listens to the participants and keeps the discussion moving forward, while remaining completely neutral throughout the process. Remaining neutral does not mean being devoid of emotion. Be pleasant and warm with participants. It is up to the moderator to create a climate that is warm and welcoming for participants. Similar strategies can be used when conducting an individual semi-structured interview.

Before you start asking the focus group questions, be sure to introduce yourself to participants. Ensure that everyone has signed a consent form. If not, have them sign one at the start of the session. You may also ask participants to make themselves name tags. If they have chosen a pseudonym, they should write their pseudonym on their name tag, rather than their real name.

Invite participants to help themselves to water or other refreshments if provided. Tell them where the nearest public washrooms are and let them know how long you expect the focus group to take.

Start the recording. Remind participants that the session is being recorded. State the date and location of the focus group. From this point forward, refer to participants by their pseudonym if they have chosen one. Avoid referring to participants by their real names on the recording.

Here are some tips to help you:

Manage the time – It is your job to ensure the focus group starts and ends on time and that there is enough time for each of the key discussion questions. Tell participants at the beginning how long the focus group is scheduled for. It is recommended graduate-student researchers keep the focus group or interview within a one-hour timeframe.

Keep participants focused – Sometimes participants try to take the discussion in a direction that is not aligned with your questions. Some participants may ramble or veer off into stories or examples that are not relevant. It is your job to keep them on task and focused.

Ensure everyone participates – Some participants may be more reserved and others may try to dominate the conversation. Ensure everyone gets a change to speak. If you notice someone has not spoken up, it is OK to turn your direction to that person and use a prompt such as, "I'm interested to know your point of view on this. What are your thoughts?" or "I noticed that [Participant] hasn't had a chance to comment on this yet. Let's give him / her a chance to contribute."

Manage those who try to dominate - If someone is dominating the conversation, do not be afraid to say, "OK, thanks for that. Now we need to hear from someone else." If a dominant participants cuts someone else off mid-sentence, you are allowed to say, "Please let [Participant] finish."

Moderating disagreement - Participants are allowed to agree or disagree with one another on their answers. Do not take sides or strive for consensus. The objective is not for everyone to agree, but rather to allow participants to exchange ideas in a candid, comfortable and safe environment. If a participant declares that someone else's opinion offends them, you can say "There are no right or wrong answers in this focus group. We respect everyone's right to have their own opinion." Then, keep the discussion moving forward. Do not allow the group to dwell on one person's dismay or indignance.

Probe for further details – While it is important to stick with the questions approved by the institutional research ethics board, the moderator is allowed to probe for deeper insights by using questions and phrases such as:

- Please give us an example.
- Why is this important to you?
- Does anyone have anything else to add on this point?

Pay attention to stragglers – Some people may wait until the focus group is ending to speak up. If this is the case, take the time to pay attention. You may be asked to supplement the field notes after the focus group to capture that individual's contributions.

Dealing with Interruptions and People Leaving Early

Participants are not required to stay for the entire time. If someone needs to leave early, thank them for participating and graciously allow them to exit.

If the focus group or interview is interrupted by an outsider, make every effort to protect the identities of the participants. Open the door, but then step outside the room immediately, not allowing the outsider to enter the room. If this happens near the end of the focus group time, it could be that the outsider has simply arrived for another meeting scheduled in the same room after the focus group ends. Politely inform the person there is a focus group in session and ask them to return later.

If you are interrupted by a fire alarm, ensure the participants' exit the room quickly. Take all recording devices and confidential documentation (e.g. consent forms) with you. Participants' safety is more important than data collection. Ensure all participants and you exit the building safely.

Concluding the Focus Group or Interview

As you conclude the focus group or interview, be sure these steps have been completed:

- Ensure all questions have been asked.
- Ensure consent forms have been signed and gathered.
- Thank your participant(s) for their time.
- If there is an incentive (e.g. gift card) for participants, ensure each person receives their gift on the way out. MEd graduate-student researchers are not provided with a research budget to support purchasing gift incentives. The Course-based research ethics also does not include gift incentives. Incentives should only be provided if approved by REB.

Be sure to tell participants that you value their time and effort. Reinforce that research is being done for them and with them.

Let people know how the results of the work will be disseminated (e.g. reports, conference presentations, etc.) If there are public presentations planned to share the results of the project, let participants know they are welcome to attend. If there are follow-up groups or other meetings that participants should be aware of, remind them of these too. Graduate-student researcher conducting research as part of the course-based ethics applications will only share the findings during the course and will not share research publicly.

Participants should leave the focus group feeling valued and appreciated.

After the Focus Group / Interview

Vacating the venue

Ensure that you leave the venue in the same condition you found it. This includes, but is not limited to:

- Arranging tables and chairs neatly. Tuck chairs underneath the tables.
- Remove any food, drink or garbage from the room. Note that if you are hosting a focus group on campus, the garbage is not picked up from some meeting rooms daily. Tie up any garbage bags in the room and remove the garbage when you leave the room. Deposit the garbage in a trash can in a publicly accessible area (e.g. in a hallway near the elevators) so the waste will be removed that same day, or in a dumpster outside.
- Turn off the lights.
- Double-check the door to ensure it locks behind you.

Reflection

Take some time after the focus group or interview to reflect on your experience. All aspects of the focus group or interview can be included in your reflection including the venue, the process, the recording and any other elements that are worth noting. Some questions that you might think about to guide your reflection are:

- In general, what worked well?
- How was the venue?
- Could everyone see and hear each other OK?
- Was the environment comfortable (e.g. not too cold, too hot, etc.)?
- Did the recording work?
- Did participants understand the questions?
- Was there any confusion among participants about the questions or the process?
- Did you get usable data?
- What points do you need to pay attention to for next time?

Your reflections can be used as part of your field notes for that session and may be helpful when analyzing the data and preparing your final report.

Preparing data for analysis

There are a few steps that need to be completed to prepare the data for analysis:

- Ensure your field notes are legible and comprehensible. Review them to ensure what you wrote down actually makes sense.
- Ensure data are anonymized. Participants' real names should not appear anywhere except on the consent forms unless they have specifically requested that their real names be used.
- Make a back-up of your recording. One copy will be used for transcription. The other copy will be kept in the project archive. If you are working with a transcriptionist, do not send him or her your only copy of the recorded data!
- Ensure the recording is saved in the appropriate format. If you are working with a professional transcriptionist, ensure the recording is saved in his or her preferred format.

Transcribing the recording

Recordings may be sent away to a professional transcriptionist or you might do that yourself. REB approval is needed if a transcriptionist will be involved in the project. Often, Master of Education students do their own transcriptions. Graduate-student researchers conducting course-based research will transcribe their own data and do not have ethics clearance to send recordings to a transcriptionist.

Data analysis

In general, focus group and interview analysis will involve systematically identifying and summarizing:

- Themes
- Patterns
- Perspectives
- Perceptions
- Experiences

Reporting the results

Focus group results can be reported in various ways including:

- Capstone research project (e.g. Collaboratory of Practice final paper)

Other ways to mobilize knowledge from your project could include:

- Poster presentation
- Conference presentation
- Journal article

Graduate-student researchers conducting research under the course-based ethics clearance are permitted to share the results during the course and are not permitted to share the results publicly. Graduate-student researchers that would like to share the results publicly need to consult with the academic program coordinator and complete an individual ethics application.

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Appendix A: Checklist: Supplies

- [ ] Two (2) Digital recorders
- [ ] Extra batteries
- [ ] Name tags
- [ ] Markers
- [ ] Extra consent forms
- [ ] Extra pens
- [ ] Watch /clock / phone
- [ ] Attendee list
- [ ] Refreshments
- [ ] Napkins / paper plates / cups
- [ ] Garbage bags

Appendix B: Checklist: One day prior to focus group / interview

- ☐ Ensure digital voice recorders are in good working order.
- ☐ Ensure you have extra batteries for voice recorders. (If not, buy extra batteries.)
- ☐ If applicable, order refreshments.
- ☐ Assemble or review the contents of your Data Collection Kit to ensure have:
  - name tags
  - markers
  - pens
  - names of participant(s)
  - extra consent forms
  - recording device(s)
  - extra batteries for recording device(s)
  - napkins
  - paper plates
  - cups
  - garbage bags
- ☐ Find the room where the focus group will be held and print off a map, if needed.
- ☐ Send a reminder to participants individually.

Appendix C: Checklist: Day of focus group / interview

- [ ] Arrive early to the venue / room.
- [ ] Set up tables and chairs so everyone can see one another.
- [ ] Set out refreshments, name tags and markers.
- [ ] Set up digital voice recorders.

Appendix D: Template for Taking Field Notes

This template can help you take effective notes during a focus group or interview. Adapt it to each situation as appropriate. Remember to include notes about unusual occurrences such as interruptions.

Research Project Title:			
Date:	[Day, month, year]	**Time:**	Include both start and end time.
Location:			
Researcher:			
Participants:	[Write names or pseudonyms of participants, as per research project protocol).		
Q1:	[Write out the question in full so you know which responses pertain to which question. Write our participants responses as fully as you can. Use quotation marks to denote direct quotations from participants.]		
Q2, etc.	[Same steps as Q1.]		

Appendix E: Template for Recruitment

This template has been approved for course-based ethics. You can adapt this template for your study.

Name of Researcher, Faculty, Department, Telephone & Email:

Supervisor (Academic Coordinator & Course Instructor):

Title of Project:

You are invited to participate in a research study called:

You were selected to be part of this study because you are known to me (personal or professional contact) and I am not in a position of authority or supervise you in your professional role. Your participation in this study will provide me with an authentic, real-world research experience. This study will be used to prepare a report as partial fulfillment in completing the MEd degree.

The purpose of the study is to:

The research question is:

Participation in this study is voluntary and you may refuse to participate, refuse to participate in parts of the study or may withdraw from the study at any time during the study without penalty. Should you choose to withdraw from the study, you have the right to request the withdrawal of your data. However, all data up until the date of withdrawal may still be used in the aggregated data collected for purposes of this study. The last point of possible withdrawal from the study is _______________ so the final report can be completed for the Collaboratory of Practice Course.

This study has been approved by the University of Calgary Conjoint Faculties Research Ethics Board.

Attached to this letter is a consent form that fully explains the intended research and the role that you might play in providing information to inform the study. Please read the consent form carefully. If you give your consent to participate in the interview (and/or focus group), please sign the form and return to the researchers within two (2) weeks of receipt of this letter.