Picture the Change
Qualitative Research Toolkit – part two

Carrying out qualitative research

1. Introduction

This guide is a starting point for any organisation in the homelessness sector that is considering carrying out qualitative research. The guide gives practical help using examples of how to conduct interviews with your clients, how to analyse the data you collect and how to use and present this information.

Homeless Link have produced additional introductory guidance on qualitative research (part one).

2. Planning and carrying out semi-structured interviews

The examples used in this section of the guidance and the example documents contained in the appendix come from a real research project that Homeless Link carried out alongside some homelessness service providers in Brighton.

1.1 Producing interview resources

i) Writing your topic guide

- See our website for a sample topic guide

  - ☑ Consider how you want your interview to flow
  - ☑ Keep questions clear and easy to understand
  - ☑ Use open-ended questions
  - ☑ Include prompts

A topic guide is a list of topics and questions that the interviewer wants to cover during the course of the interview – it is a tool that the interviewer uses to ensure that all the data required for the research project is gathered. A good topic guide should cover everything that you want to cover in your research project and will include prompts for encouraging a participant to open up.

In practice, semi-structured interviews don't follow a set order but when writing your topic guide it will help you to think about how you would like the interview to flow. For instance, one line of questioning may flow better from another – if you look at appendix 1, you can see that establishing somebody's housing situation over the last 12 months gives context to questions later on about their engagement with services and why they came to Brighton. Structuring your topic guide in this way will also make it easier to keep track of what you have covered during the interview.

When writing questions for the topic guide, try and keep them simple, clear and easy to understand – long and wordy questions can confuse and frustrate your participant. Open-ended questions are the best way to draw out information from your participant in a qualitative interview. For instance, if you want to find out about somebody's housing situation you could ask, "what's your housing situation at the moment?", or "where have you been sleeping recently?", this will get a better response than a closed question – e.g. "are you homeless?", which is likely to receive a one word answer. Nevertheless, with semi-structured interviews there is often information that you would like to gather, such as demographic information, that is best dealt with by using a closed question – e.g. how old are you?

As anybody who works with homeless people will know, it's not always easy to get people to open up about their experiences. For this reason, it's a good idea to have a ready supply of prompts, for example:

- Why?
- Can you tell me a bit more about that?
- Can I check you mean x?
- Can you give me an example?
- What specifically do you mean by x?
- How did/do you feel about that?
- Can I check I've understood what you said properly?
- What else was happening at the time?

It is useful for the interviewer to make notes during and after the interview to remind themselves about how the participant responded to the questions and the key themes that came out of the interview. This can be helpful if there is more than one person analysing and writing up the data.

As well as the topic guide, there may be other resources that are helpful for the interview. On the Brighton project we used a simple timeline to chart the clients housing situation over the past 12 months. This helped to keep track of what we have been told during the course of the interview but the completed sheets also helped when we came to do the analysis. Think about what else might help you or your participant to get the most out of the interview.

ii) Consent form & client information sheet

- See our website for a sample consent form and participant information sheet

  It is important to explain to your participants why they are being interviewed and what you will do with their information. To help with this you should produce a **participant information sheet** that covers the key things they need to know, such as:

  - which organisation you are from (if relevant)
  - why you are doing the research
  - what you will do with their information
  - how long you expect the interview to take
  - your role as an interviewer

  Read through the information with the participant and allow them to take the sheet away to read in their own time. After you have talked through the client information sheet with your participant you should ask them to sign a **consent form**. It is unfair to ask a participant to sign a consent form before they have been given information about the research project so make sure you explain the information on the participant information sheet first. A consent form should include everything you want them to consent to, such as:

- taking part in the interview
- allowing the interview to be recorded
- allowing the information you collect to be reported anonymously

iii) Planning

Semi-structured interviews can generate a wealth of qualitative data but they can also be time consuming and tiring. If you do not prepare your research properly and plan correctly for the interviews you may quickly find yourself overwhelmed. The following things will help you to manage your project:

- ☑ an interview timetable
- ☑ progress monitoring spreadsheet

It is important to remember when planning an **interview timetable** that there are only so many interviews that one person can do in a day without feeling burnt out. Interviews can be tiring so in order to get the best from them it is important that the interviewer can engage the participant. Factor this into your timetable and factor in time between interviews to write up your thoughts and the key themes that emerged. This might not seem important at the time but it will help you to jog your memory and distinguish between the interviews when you come to do your analysis.

Given the large amount of data that qualitative research projects generate, it is important that you keep track of your project as you go along. If you don't do this from the beginning it is easy to get lost. A progress monitoring spreadsheet will help with this. Think about the key pieces of data that you want to collect. For instance, on the Brighton project, we entered the following information into the spreadsheet.

- client name & client code – it is useful to give every participant a unique code so interviews can be referred to their code rather than name and helps comply with anonymity and confidentiality of the participant
- date of the interview
- name of interviewer
- age
- gender
- key themes
- current housing situation
- accommodation in last 12 months
- repeat homelessness in last 12 months
  using which Brighton services?
- Reasons for coming to Brighton

If you are disciplined about writing up notes after interviews and filling in the progress monitoring spreadsheet, you will find it much easier to identify emerging themes when you come to do your initial analysis.

Remember, qualitative research is an iterative process (see Homeless Link's introductory guide to qualitative research) – if necessary you can make improvements to your topic guide questions as the project goes along. It is also useful to test your questions first, called a pilot phase, to check if they work and produce the information you are looking for. You will learn about what works well and what doesn't and this should form part of your approach. Don't be afraid to make changes, as long as they are in keeping with the aims of the research project.

iv) Preparing for interviews

Before you start your interview there are some crucial actions you must take in order to be prepared.

- ☑ risk assessments
- ☑ considering conflicts of interest & other obstacles
- ☑ considering data protection & data sharing issues
- ☑ participant interview packs
- ☑ be flexible
- ☑ recording interviews
- ☑ preliminary interviews
- ☑ ethical considerations

You should take the same precautions when carrying out an interview for a research project that would take when interviewing or assessing a service user. Assess the risks to your clients and to yourself and think about what you can do to minimise problems or to deal with things if they go wrong. If possible, conduct your interview in a calm environment, but where other colleagues are at hand should something go wrong. If you are interviewing people with particular vulnerabilities, consider what you can do to make the interview more comfortable. For instance, on the Brighton project, we took a conscious decision that female participants were interviewed by other women.

Ethics are an important consideration for any research project. When you are conducting research with vulnerable people you must consider the justifications of using them and the impact this might have on their wellbeing. Have you fully informed your participants about why you are doing the research and what it will be used for? Are there any perceived risks or harm for those people taking part? Ethics do not only apply to fieldwork part of your research. Once you have collected your data it is important that you have analysed and reported on the data accurately and you keep the keep the anonymity and privacy of your research participants, eg. fieldnotes and transcripts should not record any information that could reveal the identity of your participants such as their address. More information on research ethics can be found here: http://the-sra.org.uk/research-ethics/ethics-guidelines/

Before you set out for the interviews make sure you have put together interview packs with your topic guide, participant information sheet, consent form and any other resources you need. This might sound obvious but it's easy to overlook with all the other considerations!

As anyone who has been involved in interviews for a qualitative research project will tell you – prepare to be let down. It is common for participants to change their minds or not turn up. This is all part of a research project so where possible, have a plan B and alternative participants to interview.

Ideally, if your participants consent, you will record your interview. Recording makes it much easier for you to accurately record your participant's thoughts and represent them when writing your report. There is a wide range of technology available for recording interviews and sharing the files with colleagues on the project (if required). Most phones now have applications for voice recording and a Dropbox account is a simple way of sharing files. However, there is no standard and therefore you will have to choose your method and make sure it is suitable before you step into your interview. In particular think about:

- Will your recording device accurately record both you and the participant?
- Will your recording device record for long enough? e.g. anything from 25 mins to over 1 hour
- How will you get your recording from your device to your computer? Remember that you will need to transcribe your interview and this is done best from a computer
- Can you share your file with colleagues if you need to (taking into account data protection rules)?

Before you start the project fully, it is a good idea to **run a preliminary interview** (usually called a pilot interview) to test your topic guide and other materials and to do a test run of the recording.

v) Carrying out interviews

- ☑ Length of interviews
- ☑ Using the interview resources
- ☑ Role of the interviews

There isn't a standard time for interviews as they very much depend on the participant, topic area and how many questions you intend to ask. Generally, between 30 and 45 minutes is advised but dependent on the participant these may run over or under.

Before you start your interview you should check if the participant understands why you are carrying out the research and go through all the points on the **participant information sheet**. At this point, go through the consent form and ask them to sign if they agree to the points in the **consent form** (including being interviewed). Don't start your recording until you have done both of these things.

As discussed previously, **use your topic guide** to make sure you cover the topics and questions you need but don't use it as a rigid script. If the participant touches on an area that you planned to ask about later, that's fine. However, if your participant veers completely off topic, as often happens, politely bring them back to the topics in hand.

Remember that **the interviewer should be neutral** and should get involved with the issues they encounter. For this reason, it is best that participants are not interviewed by people they have a close working relationship with – e.g. a keyworker. No matter how tempting it should be to offer advice or support to your participant, this isn't the **role of the interviewer** and it can skew the results of the research if you do this. If you encounter a safeguarding concern during your interview, raise this with the participant's keyworker or the manager of the service involved.

vi) After the interview

Try not to do back-to-back interviews – you will get tired and find it harder to process the information. Instead, **build-in time between interviews** to fill out the section on your topic guide about how the participant responded and the key themes. This will help if interviews overrun and will and it will also assist you later when you come to do your analysis.

Interviews can sometimes touch on topics that are sensitive or upsetting. You may even get an interviewee who responds badly to your questions. It is useful to think about advice and support to signpost or refer a participant to. You also need to ensure your interviewers are able to talk to someone and fully debrief if this happens.

3. Analysing and presenting your data

- ☑ The qualitative data analysis approach
- ☑ Gather and sort your data
- ☑ Reflect on what the data is telling you
- ☑ Transcribe your interviews
- ☑ Identifying emerging themes / categorising
- ☑ Coding interview transcripts
- ☑ Drawing conclusions & building arguments

i) The qualitative data analysis approach

Qualitative data analysis lends itself best to a **bottom-up approach**. This means that you allow your conclusions to emerge from the data, rather than a top-down approach, which tests data against a pre-existing hypothesis.

Qualitative data analysis is also an **iterative process** (see Part 1 of the qualitative toolkit) - you are not expected to do it all in one go - the data benefits from being scrutinised multiple times and your conclusions will emerge over time, as you get to know the data. The important thing is to *really get to know your data*. The analysis begins after you finish your first interview and ends when you finalise your conclusions.

There is no set process for carrying out qualitative data analysis: there are actions that you will need to carry out but they don't follow neatly from one to the next. Rather, you will find that many of the actions outlined below are carried out alongside each other and are repeated multiple times.

ii) Gather and sort your data

By the time you finish your research you could have dozens of hours of interviews and other materials such as interview notes. If you don't sort the data as you go along, in a way that makes comparison easier – e.g. the progress monitoring spreadsheet, you will find that you have made a mountain of work for yourself! Sorting your data will also make it easier to draw comparisons and reflect on what the data is telling you.

iii) Reflect on what the data is telling you

Reflecting on the data is something you should do continually throughout the process, not just at set points. As you go along you should make notes of what you notice and if there are patterns and categories you see emerging. If there are others involved in the research it will help to meet with them regularly so you can compare notes and identify emerging themes.

iv) Transcribe your interviews

Ideally, if you have carried out interviews, you will have recorded them. The next step is to write up your interviews as fully as possible. Start doing this as soon as you can as there is a lot of work involved in transcribing. Although transcribing is time-consuming, it is also a good way of really getting to know your data as the time you spend on it will force you to reflect on the interview.

It is not always necessary to write up all the data you collect but if there is more than one person analysing the data this will help. **Transcribing is a very time-consuming task** so you should balance the need to transcribe with your time constraints.

v) Initial analysis

When you have enough data, you should carry out an initial analysis. Pull together everything you have learnt from the data, sit down with other colleagues who have carried out the research and decide what you think are the emerging themes and identify categories that you can sort your data into. This will help to guide your thoughts as you continue to transcribe and reflect on the data.

Remember, the themes and categories you decide at this stage are not set in stone – they will almost certainly change as you continue with the analysis and get to know your data better.

vi) Coding

When you have done your initial analysis and identified emerging themes and decided on the categories you want to use, you can begin the process of coding your data. Coding is the process of going through your transcripts and identifying data that fits with the categories you have identified in your initial analysis. Again, this is a big job so don't wait until you have transcribed all your interviews before you begin coding.

Coding is more than just another way of sorting data – through this process you are testing the themes and categories you identified in your initial analysis against the actual data to see if they stand up. Through this process you will get to know the data even better and you will fine-tune your understanding of the themes contained in the data.

There is no set approach to coding, you may prefer to copy and paste quotes from your transcripts into an excel spreadsheet with headings for the different categories, for instance. You may also prefer to do the coding on paper – printing out the transcripts and highlighting the data that fits with the different categories (although this will require you to go back and cut and paste the data later on). You can save time on coding if you have access to qualitative data analysis software, such as Nvivo, which Homeless Link used for the Brighton Project.

vii) Analysing and presenting your data

By the time you have sorted, transcribed and coded most of your data, reflected on what it is telling you and sorted it into categories, you will be ready to start drawing conclusions and building arguments that you can use in your report or present to other colleagues. It is useful at this stage to think about how you would like to present your data. Some things to consider are:

- Use of quotes to support your analysis and arguments – the strength of qualitative data is to draw out the participant voice through their own words
- Case studies which present the story or journey of individual participants
- Drawing on individual participants to illustrate your analysis
- Presentation format - this does not necessarily have to be a long report but could be a PowerPoint presentation or a short summary with quotes and infographics

Homeless Link have produced additional guidance on data visualisation and can be accessed here [insert link].

viii) Avoiding common pitfalls

Whilst qualitative data can provide a rich and insightful resource for your organisation there are some common pitfalls to think about when presenting and using your data:

- Using quotes in isolation – if the quote only reflects the view and experience of one person in your study then make this clear
- Making broad statements on a small sample of participants
- Have you anonymised your data? Be careful to ensure that participants cannot be identified in the data

4. Using your research

You have your qualitative data and output but then what happens? Homeless Link has produced guidance on how to analyse and communicate your data. This considers how data can be used to develop a service to meet the needs of the people who use it; commissioning new or existing structures; and demonstrating the impact of a service.