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School of Medicine
UNIVERSITY OF COLORADO
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HOSPITALS & CLINICS

University of Iowa Health Care

QMLC ADVANCED QUALITATIVE METHODS – JUNE 9, 2022
**BUILDING A COMMUNITY OF
PRACTICE AROUND DIGITAL
METHODS**

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Poll Question #1

In your experience with virtual qualitative research, what have been your main challenges? (choose all that apply)

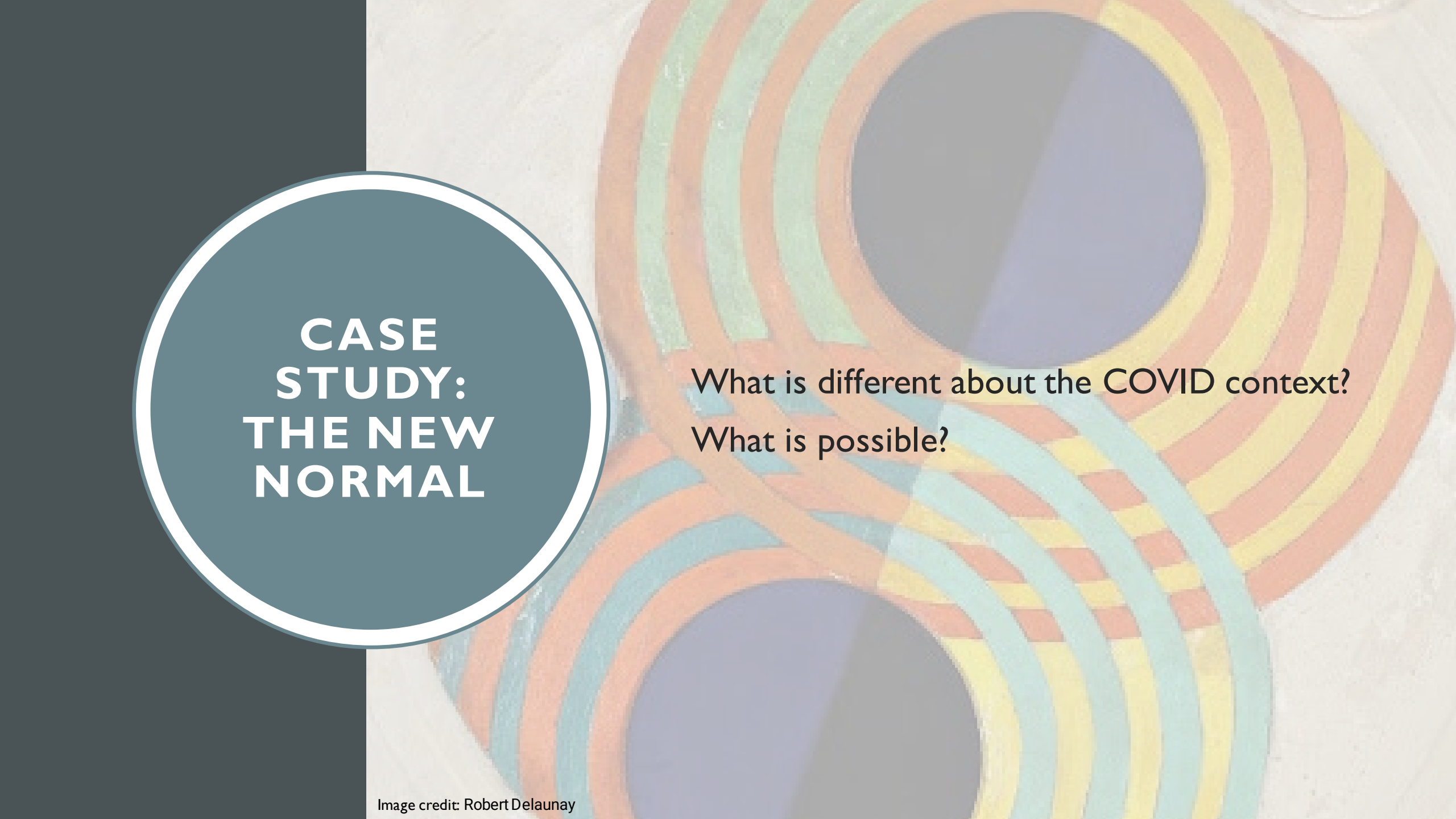
- Ethical challenges
- Regulatory approval
- Recruitment
- Data collection logistics
- Changing research context creating uncertainty
- Transitioning pre-COVID study designs/budgets/teams to new COVID-sensitive protocols
- Describing methods in manuscripts
- Lack of institutional guidance
- N/A – I have not used virtual qualitative methods

OBJECTIVES

- Outline and demonstrate a way of thinking critically about the use of digital methods
- Provide practical guidance for digital methods
- Acknowledge this historical moment and its impact on our work

PRESENTATION OVERVIEW

- Case Study: The New Normal - Jane Moeckli
- Scoping Review
- Reflexive Digital Workflows
- Case Studies: Adaptations in Action
 - Data Collection in Virtual Spaces – Jessica Young
 - Using Technology Thoughtfully – Ana-Monica Racila
 - Accessing Communities Virtually – Karen Albright
- Publishing Considerations
- Guiding Questions
- Resources



**CASE
STUDY:
THE NEW
NORMAL**

What is different about the COVID context?
What is possible?

THE NEW NORMAL

Proposal Submitted



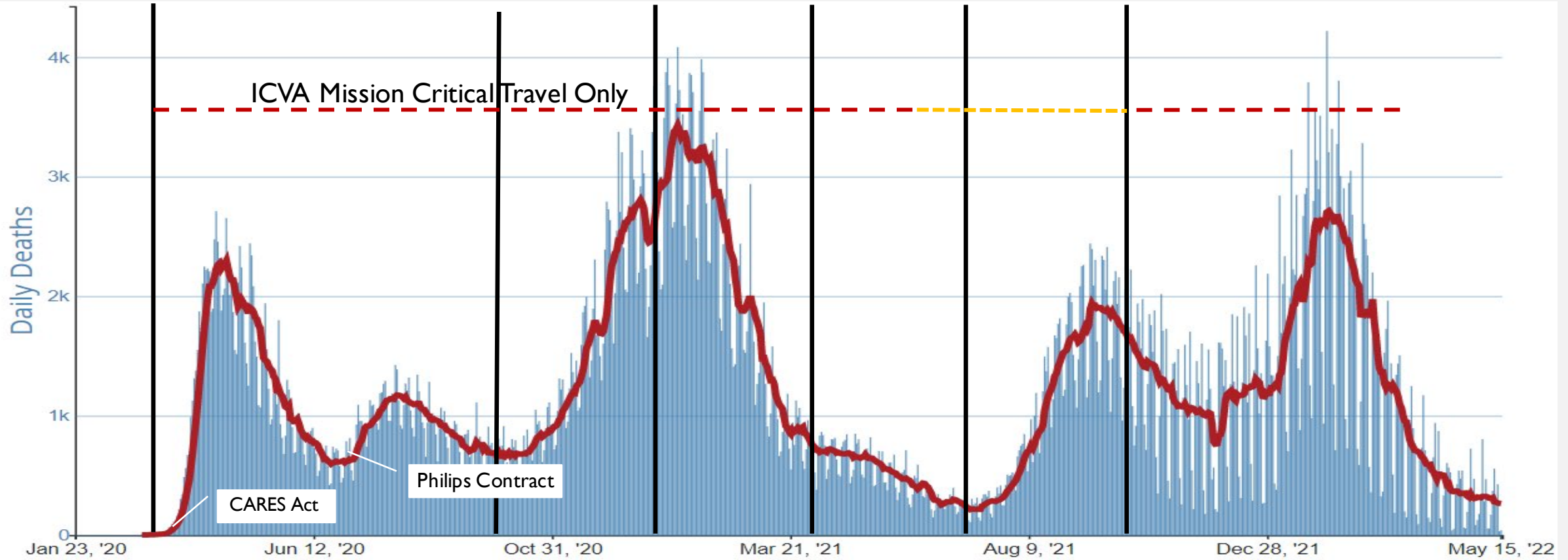
FY21 Q1
Structured Interviews

FY21 Q2
Analysis & Feedback

FY21 Q3
Site Visits

FY21 Q4
Analysis & Design

FY22
Develop, Implement, Evaluate



Daily Trends in Number of COVID-19 Deaths in The United States Reported to CDC, https://covid.cdc.gov/covid-data-tracker/#trends_dailydeaths, accessed 5/17/2022

THE NEW NORMAL

Proposal Submitted

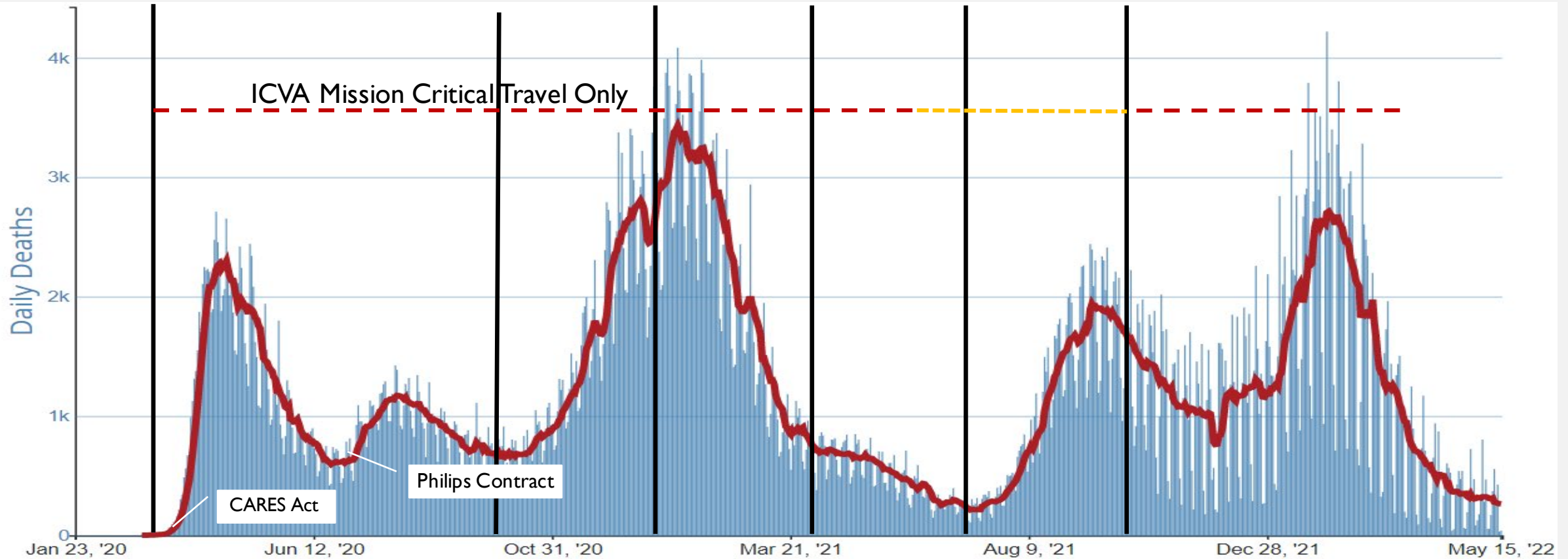
WHAT HAPPENED

FY21 Q1-Q2
Establish New Team
Revise Protocol

FY21 Q3
Structured Interviews

FY21 Q4
Analysis & Feedback

FY22 Q1-Q3
Scoping Reviews & Hybrid Site Visit Groundwork



Daily Trends in Number of COVID-19 Deaths in The United States Reported to CDC, https://covid.cdc.gov/covid-data-tracker/#trends_dailydeaths, accessed 5/17/2022

ADAPTING TO THE NEW NORMAL

- The COVID context is different than past disruptions to research
 - High uncertainty
 - Long timescale
 - Dynamic contexts force change to research practice
 - Necessary changes to research practice outpace institutions' ability to respond
 - Broad impact, differently experienced
- Conducting “virtual observations” of on/offline work is possible but complicated
 - Regulatory, union, logistic, cost & methodological considerations
 - + Increases flexibility
 - + Generates new research questions and pushes methodological innovation



SCOPING REVIEW

What can we learn about the use of digital methods in ethnographic research in VA?

SCOPING REVIEW

Method

- Assess the state of the field
- PubMed
- Oct 2019-Dec 2021
- VA+digital+ethnography
- Limited by publication timelines, search timeframe, exclusive focus on VA and PubMed

Findings

- 6 articles met criteria
- “Digital” and “virtual” described recruitment techniques, supplementary online materials
- Data collection occurred before pandemic & in-person
- One identified virtual & in-person observations (Van Tiem et al., 2021)

Key Takeaways

- Need a shared language for digital methods
- Need reflexivity about digital tools & spaces

QUALITATIVE WORKFLOWS, DIGITAL TOOLS & REFLEXIVITY

PAULUS AND LESTER 2022

Communication & Project Management Tools

- A/synchronous communication tools
- Project planning tools
- Digital storage
- Writing tools
- Dissemination tools

Literature & Data Collection Tools

- Reference manager
- Web clipping and note taking
- Audio and visual recording
- Mobile applications

Data Organization & Management Tools

- QDAS software (Atlas.ti, Nvivo, MAXQDA)
- Integration with other tools

Digital tools and spaces can be incorporated into each phase of qualitative research to facilitate collaboration, improve efficiency, and promote dissemination.

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The introduction of technology to the qualitative workflow is never neutral or without consequence. Reflexive digital workflows invite us to critically evaluate the use of technology and account for its impact on people, things, methods, and outcomes.



**DATA
COLLECTION
IN VIRTUAL
SPACES**



What are opportunities & challenges in adapting research methods to virtual spaces?

EMBRACING THE VIRTUAL: OPPORTUNITY & NECESSITY

Shifts in how we live, work, and provide clinical care create new opportunities for engagement:



**Adoption of
virtual modalities in
clinical settings**



**Teamwork &
Communication**



Time spent virtually

Virtual Spaces are a New Normal

ADAPTING IMPLEMENTATION EVALUATIONS DURING COVID

Background

- Two operations-partnered QI evaluation projects
- 3 years+ data collection
- 10 sites across VA
- Identify factors affecting implementation

Challenges & opportunities

- No site visits, overburdened staff
- Increased use of virtual settings/platforms

Our adapted approach

- Integrate data collection into existing virtual work-spaces
- Minimize site/participant burden

What could we “see” virtually?

NEW SPACES: NEW OPPORTUNITIES

The screenshot shows the Microsoft Teams interface. On the left, the navigation pane includes Activity, Chat, Teams (highlighted with a red box), and Calendar. The main area displays a chat window for the 'NTLive Launch' team. The chat history includes a message from an unnamed user about a budget approval and a document titled 'JulyPromotion.docx'. Below that is a message from Krystal McKinney with a 'Game plan' and a 'Reply' button. The next message is from Serena Davis, stating 'Scheduled a meeting', which is highlighted with a red box. Below this is a meeting card for 'All hands - March 21' on January 7, 2021, from 10:30 AM to 11:30 AM, with 15 replies from Oscar, Babak, and Cecily. The chat continues with a message from Kian Lambert about a 'big FY 2017 pitch' and a 'Reply' button. At the bottom, there is a text input field 'Type a new message' and a toolbar with icons for emojis, attachments, and other functions.

The screenshot shows a Microsoft Teams video meeting in progress. The meeting title is 'Review Session' and the duration is 00:25:17. The meeting controls at the top include icons for mute, video, chat, and a 'Leave' button. The video grid shows four participants: Cent Room Pylama, Babak Sharmas, Charlette de Crum, and another participant whose name is partially obscured. A transcript window is open on the right side of the meeting, displaying a conversation between participants. The transcript includes the following text:
Jacquie Simmons: 11:23 AM
Welcome to the team, Babak!
Merie Beaudoin: 11:23 AM
Great to meet you. Really looking forward to working with you.
Babak Sharmas: 11:23 AM
Thanks for the intro, Charlotte, it's a pleasure to meet you all today.
Merie Beaudoin: 11:23 AM
So what did you all think of today's kickoff meeting for the new building project?
Jacquie Simmons: 11:23 AM
It's very exciting. I've already been thinking about some ways the buildings can be designed.
Daniela Marsden: 11:23 AM
We're off to a great start. Let's keep the momentum going.
Babak Sharmas: 11:23 AM
I'm going to
A 'Stop transcribing' button is visible at the bottom of the transcript window.

OBSERVATION OF VIRTUAL MEETINGS & SPACES

Observation of meetings throughout implementation cycles

- Various teams/groups within and across sites
- Synchronous
- Participant-observer role
- Responsive to site context, changes, imp, stage

Data included:

- **Field notes** - specific content and context
- **Textual data**
 - Chat fields, documents, channel posts, task trackers
- **Participant elicitations**
 - Synchronous: Within meeting (verbal, chat)
 - Asynchronous: Brief facilitated follow-ups
 - Extend and verify observational data

BENEFITS OF “GOING THERE” VIRTUALLY

Bridges gap between what people do and what they say they do

Increased specificity results in actionable findings

Captures data that may otherwise be missed

Enables prolonged engagement

Reduces burden and cost

Easier to get permissions and buy-in

Increases data heterogeneity, diverse perspectives

CHALLENGES & CONSIDERATIONS

Methods and Rigor

Access & control

Scoping data collection

Analysis

Ethical considerations

Power & permissions

Consent

Who is in the (virtual) room?

Role transparency



**USING
TECHNOLOGY
THOUGHTFULLY**

How do we collect data effectively with digital technology?

How do we protect that data?

How do we ensure participant privacy?

GU-GAHT STUDY

- Non-VA University study funded by an internal urology grant
- Designed and conducted after the start of COVID
- Study Objectives:
 - Advance knowledge about the genitourinary healthcare of gender-expansive people
 - Enhance clinician-patient communication
 - Understand participants' experiences and expectations of genitourinary (GU) changes while receiving gender-affirming hormone therapy (GAHT)

PROJECT DESIGN

In-depth, semi-structured interviews

Gender-expansive participants

Designed during COVID

Conducted using Zoom

Treat data like HIPAA-level data

Concerns related to identity disclosure

VIDEOCONFERENCING BENEFITS

Body Language

- Reading emotion cues
- Attending to silence
- Non-verbal communication reciprocity

Recordings

- Crystal clear audio and easy to manually transcribe

Participant Autonomy

- Control over where and when interviews occur

TECHNOLOGY CONSIDERATIONS

- Accessibility/Availability
- Technical interruptions
- Security configurations

PROJECT DESIGN

Configured Zoom for
HIPAA-level data capture and storage

Created an e-mail address solely for the study

Opted for one-on-one interviews

Masked participant names in file titles

COMMUNITY NEEDS ADDRESSED

Protected against accidental identity disclosure

Kept communications between
participants and study team secure

Maintained participant safety

Kept participation confidential long-term



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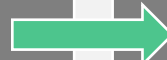
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ACCESSING COMMUNITIES VIRTUALLY

How do we connect virtually with harder-to-reach populations for whom Zoom isn't a good option?

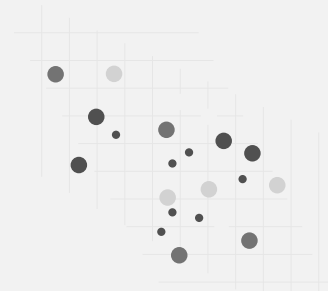
What does this mean for community-engaged research?

POWER, REPRESENTATION & EQUITY



Pre COVID-19: In-person Meetings or Interviews

Strengthens relationships
Establishes trust



COVID: Social Distancing & Increased Marginalization

Digital Divide
Longstanding distrust
Mixed-documentation status



Assess Needs & Accessibility

Pandemic and social distancing may have deepened vulnerability, marginalization and/or distrust

THE PHONETREE METHOD AS A CREATIVE CASE EXAMPLE

- Robert Wood Johnson Foundation's Interdisciplinary Research Leaders Program
 - “Team Colorado” and the Center for Health Progress
- Research embedded in a broader, well-established community organizing model
 - Deeper understanding of the root causes of problems, as well as an appropriate vision for a transformed community, is impossible without engaging those most directly affected
- Iterative phone tree methodology enabled more rapid assessment of immigrants' health and social service needs as they evolved over the course of the pandemic
- Community engaged approach that prioritizes relief and relationships, rooted in community organizing methods
- Response to the need to:
 - Reconceptualize community engagement during the pandemic
 - Reach marginalized, “hard-to-reach” populations that often go overlooked or are inaccessible to researchers
 - Understand and quickly react to community needs

Team Colorado

- Joe Sammen, MPH
- Karen Albright, PhD
- Maria de Jesus Diaz-Perez, PhD
- Perla Rodriguez
- Morgan Health Connectors
- Theresa Trujillo
- Maggie Gomez
- Dana Kennedy



PROJECT DESIGN

Grass roots organizers worked with Center for Health Progress volunteers (*Caracol* leaders) to call community members

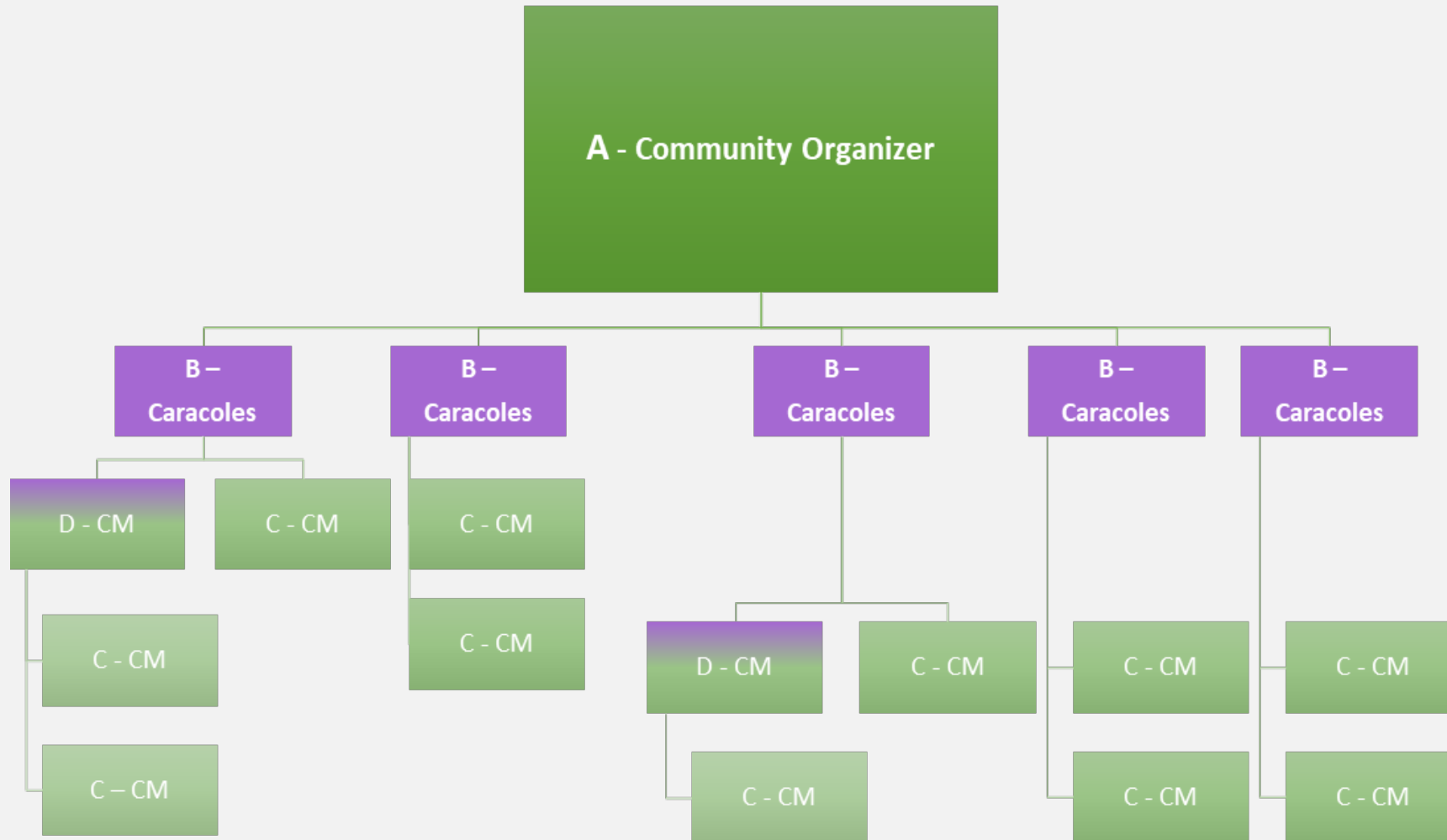
Snowball sampling through networks & purposive sampling of individuals seeking immediate relief

Questionnaires included closed- and open-ended questions and were offered in English and Spanish

4 rounds of data collection (Mar–Dec 2020)

Iterative analysis & findings reported back to community members

PHONE TREE STRUCTURE



Key:


A – Community Organizer (CO), Center for Health Progress Staff

B – *Caracoles* call up to 10 community members (CM)

C – CM complete questionnaire & provided with *Caracoles* contact information if they need help connecting with resources

D – CM interested in becoming a *Caracol* leader are trained by the CO and start calling new CM

Addressing health care needs of Colorado immigrants using a community power building approach

Karen Albright PhD^{1,2}  | Maria de Jesus Diaz Perez PhD³ | Theresa Trujillo BA⁴ |
Yesenia Beascochea BA⁴ | Joe Sammen MPH⁴

- 330 interviews with 208 unique people across 4 rounds
- Documented current issues on the ground, identified themes across Center for Health Progress base, and connected people to resources to meet their immediate needs
- Data used to help secure Emergency Medicaid expansion to include COVID treatments
- Influenced development of multilingual guides for accessing health care and direct services, and a relief fund

BENEFITS
OF
PHONE TREE
METHOD &
COMMUNITY
ORGANIZING

- Shows the potential for **nimble** and **impactful** data collection that is truly **community-engaged**
- Suggests a third way, beyond:
 - In-person meetings
 - More technologically advanced virtual platforms

PUBLISHING CONSIDERATIONS

Methods

- Strong rationale for why you chose virtual data collection
- Describe how you adapted non-virtual data collection techniques to fit a virtual context

Discussion & Limitations

- Honest appraisal of pros and cons of virtual engagement
- Explain impact of method on your data

Engage Scholarship

- Cite other works that involve virtual data collection



GUIDING QUESTIONS

- What can we learn from our own experience and related fields about virtual methods?
- How do we build and engage with existing scholarship about virtual methods?
- What digital tools and spaces enhance your qualitative research practice? With what effects for your study population?
- What is lost using digital methods? What is gained?
- How does the virtual pivot impact how we think about and practice conventional methods?
- What would guidelines look like for upholding and evaluating rigor, ethics, and quality using digital methods?

Poll Question #2

What virtual qualitative data collection methods would you like to learn more about? (choose all that apply)

- Virtual recruitment
- Virtual interviews
- Virtual focus groups
- Virtual observation/ethnography
- Asynchronous written communication (text messages, email interviews)
- Asynchronous non-written communication (images, audio)
- Collecting digital artifacts (photos, MS Teams chat)

SELECT RESOURCES

- Adams, C., & Thompson, T.L. (2016). *Researching a Posthuman World: Interviews with Digital Objects*. Palgrave Pivot.
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- University of Colorado School of Medicine

Questions? Ask us!

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