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What's at the core? Intro to the VA Qualitative Methods Learning Collaborative (QMLC) and scoping of Qualitative Cores: How they operate and what resources they offer

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Leah M. Haverhals, PhD, MA; Gemmae M. Fix, PhD



# PRESENTERS

# CEIR

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**Ann Arbor VA  
QMLC and IRG lead  
Implementation  
Scientist  
QMLC Advisory Group  
25 years at VA**

# cadre

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**Jane Moeckli, PhD**



**Iowa City VA  
Cultural Geographer  
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10 years at VA**

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**Leah Haverhals, PhD, MA**



**Denver VA  
Social Scientist  
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QMLC Advisory Group  
11+ years at VA**

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**Gemmae M. Fix, PhD**



**Bedford VA  
Anthropologist  
Investigator  
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# LEARNING OBJECTIVES

- **Gain familiarity with the Qualitative Methods Learning Collaborative**
- **Provide an overview of VA HSR&D's history of qualitative methods in Health Services & Implementation Science**
- **Provide an overview of the current state of Qualitative Cores**
- **Learn strategies to build your qualitative communities**



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# POLL QUESTION #1

- **Does your department/VA have a Qualitative Core?**
  - Yes
  - No
  - Unsure, Maybe?



## POLL QUESTION #2

- **What are your qualitative needs?**
  - How to organize a qualitative core
  - How to fund a qualitative core
  - Learn qualitative research methods (data collection, analysis)
  - Advice on publishing qualitative manuscripts



# OUTLINE

- **Introduction to the Qualitative Methods Learning Collaborative**
  - Origins & Mission
- **State of Qualitative Methods**
  - QMLC survey results
  - Scoping of national infrastructure
  - Comparisons across qualitative cores, including operations & resources
- **Strategies for building qualitative communities & expertise**



# QUALITATIVE METHODS IN HSR

- **A Very Brief History**

- HSR grew out of medicine & economics
- Qualitative research came later
- Qualitative researchers trained in a variety of fields, including:
  - anthropology, geography, linguistics, social sciences, sociology...
- Growth of Implementation Science has further increased the demand for qualitative expertise
- VA HSR&D largely follows (& leads in!) this pattern



# IMPLEMENTATION RESEARCH GROUP (IRG)

- **600+ members**
- **VA, non-VA, international**
- **Overarching monthly seminar**
- **5 working groups, including:**
  1. Adaptation, Fidelity, and Tailoring (AFT)
  2. Advancing Implementation Science
  3. Configurational Comparative Methods
  4. Implementation Facilitation Learning Collaborative
  5. Qualitative Methods Learning Collaborative



# QUALITATIVE METHODS LEARNING COLLABORATIVE (QMLC)

- Est. Spring 2020
- Largest IRG working group (starting at 200)
- National need to share qualitative methods expertise
- Implementation expertise varies
- Advisory Group (N=28), meets monthly to bi-monthly
- Cyber-seminars bi-monthly
- *Possible working groups*



# THE QMLC MISSION

- Advance qualitative methods
- Build a community of (VA & non-VA) researchers
- Needs assessment
- Learn & teach qualitative methods
- Develop strategies for others interested in building their qualitative communities & expertise
- Share best practices

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# QMLC SURVEY RESULTS

N=200 (of 250 members)



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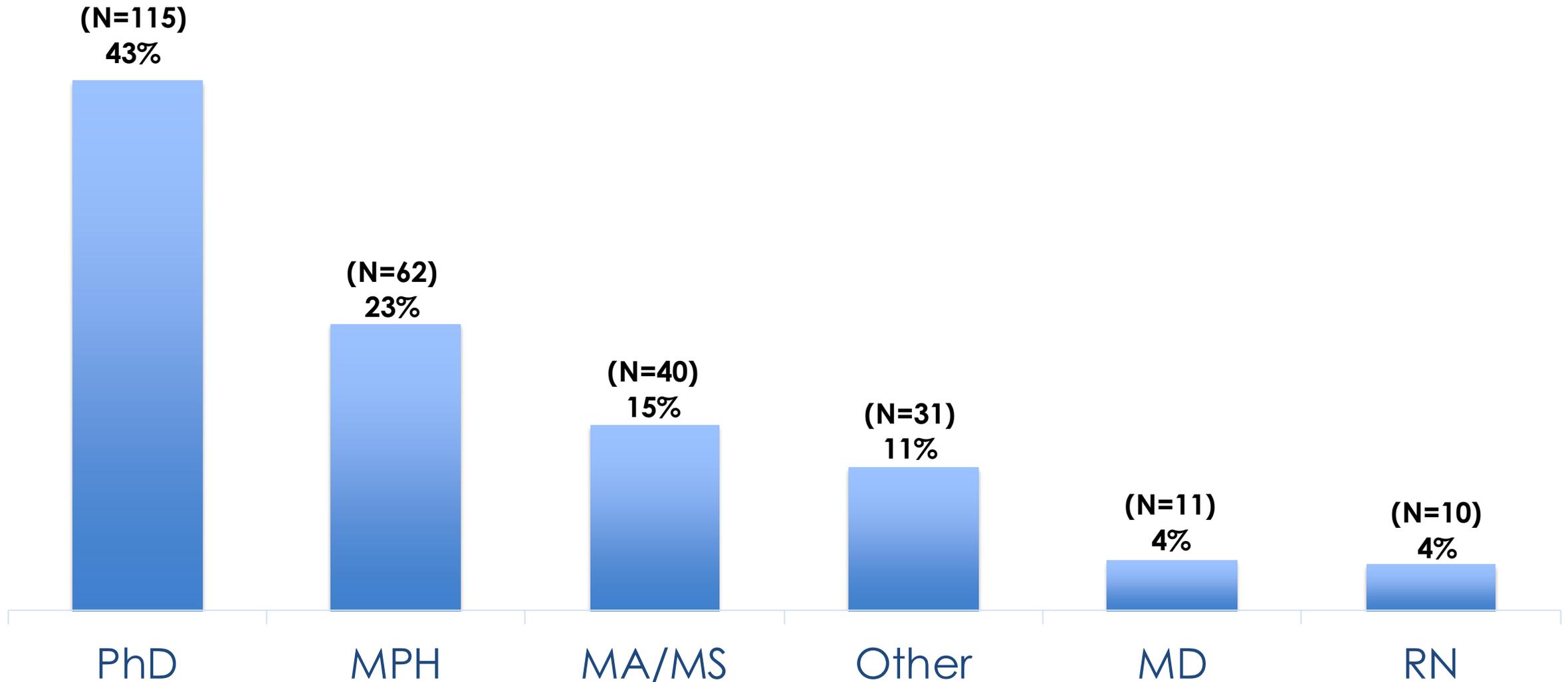


# RATIONALE FOR SURVEY

- **Assess level of members' expertise to enable tailored & appropriate content**
- **Find out what members hoped to gain when they joined this group**
- **Determine where the members are located/ affiliations**

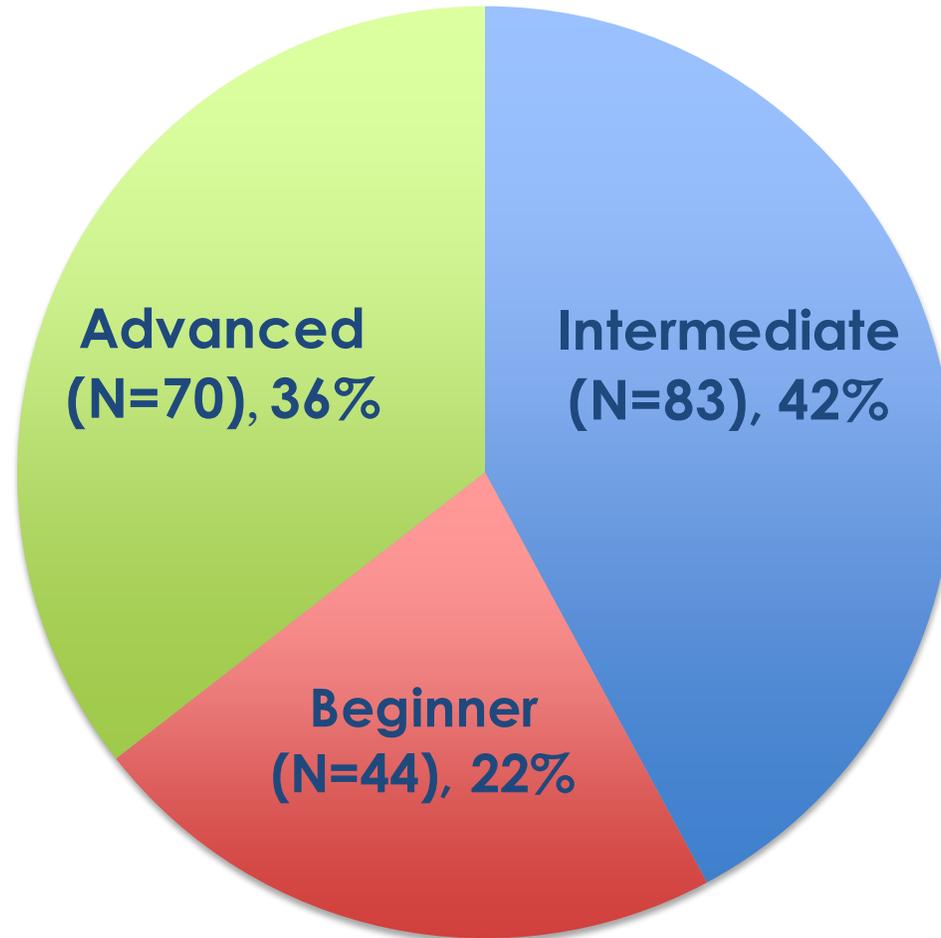


# QMLC MEMBER TRAINING





# QUALITATIVE METHODS KNOWLEDGE





# QUALITATIVE EXPERTISE

Please select your area(s) of qualitative expertise (check all that apply). - Selected Choice	Count	Percentage
<b>Qualitative interviewing</b>	<b>142</b>	<b>85%</b>
<b>Qualitative analysis</b>	<b>136</b>	<b>81%</b>
<b>Qualitative coding</b>	<b>132</b>	<b>79%</b>
<b>Qualitative interview guide development</b>	<b>129</b>	<b>77%</b>
<b>Qualitative codebook development</b>	<b>113</b>	<b>67%</b>
<b>Mixed methods combining qualitative and quantitative data</b>	<b>82</b>	<b>49%</b>
<b>Rapid qualitative analysis</b>	<b>68</b>	<b>40%</b>
<b>Formative evaluation</b>	<b>64</b>	<b>38%</b>
<b>Feedback loops to sites with qualitative implementation data</b>	<b>33</b>	<b>20%</b>

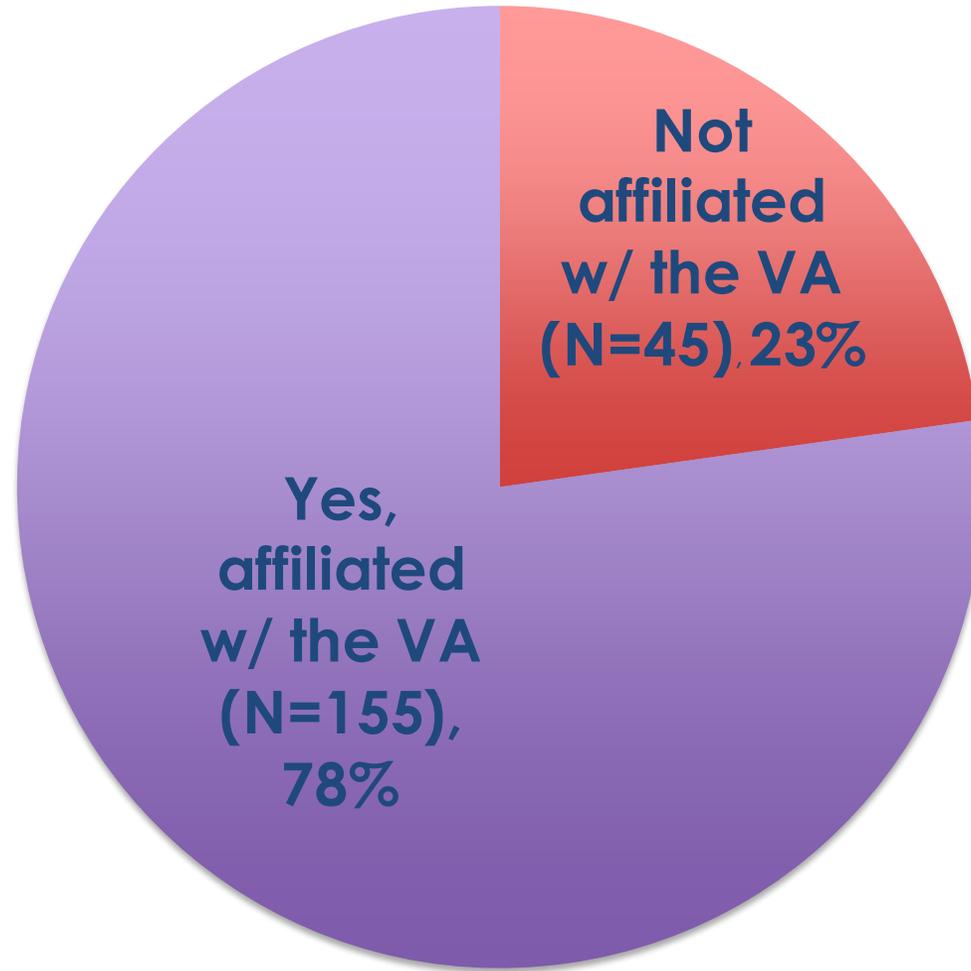


# “WHAT ARE YOU HOPING TO GET OUT OF THIS QUALITATIVE LEARNING COLLABORATIVE?”





# QMLC AFFILIATION BREAKDOWN



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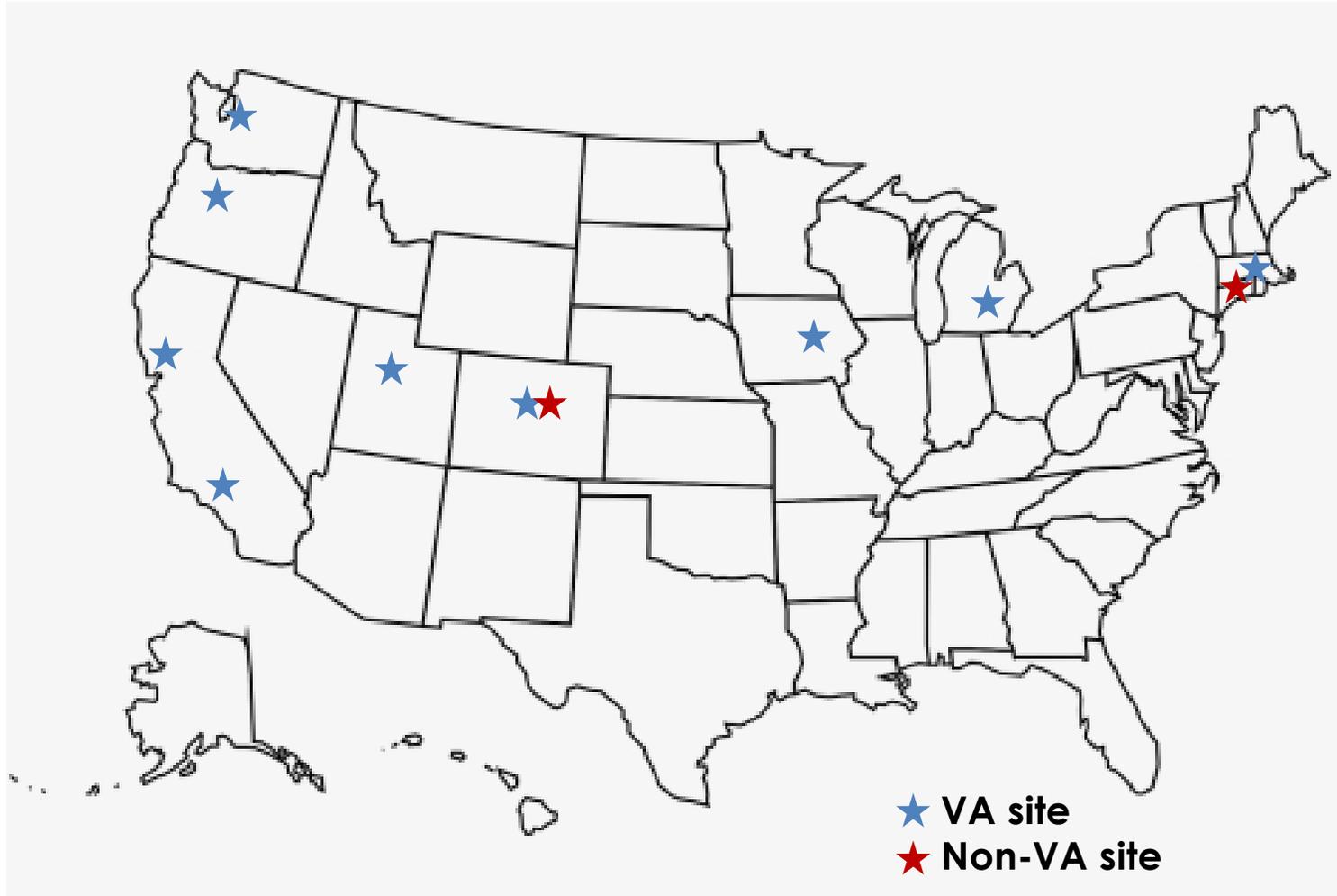


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# Scoping Review of Qualitative Research Infrastructure



# SITES PARTICIPATING IN SCOPING REVIEW



**Researchers from 11 sites contributed information about qualitative work and its organization**







# TYOLOGY OF QUALITATIVE RESEARCH ORGANIZATION IN VA



## Sole Investigator

### Setting:

- No/limited qualitative community

### Responsibilities:

- Obtains funding
- Leads own projects
- Acts as Co-Investigator or analyst on other projects
- Consults on project design
- All administration
- Budgets & tracks qual work



## Multiple Investigators, No Core

### Setting:

- Multiple experts
- May have independent qual staff
- No formal structures
- Ad Hoc support

### Responsibilities:

- Obtains funding
- Leads own projects
- Acts as Co-Investigator or analyst on other projects
- Consults on project design
- All administration
- Budgets & tracks qual work
- Trains non-qual staff on qual methods & analysis



## Qualitative Methods Group

### Setting:

- Multiple experts
- May have independent qual staff
- Peer mentoring
- Limited infrastructure

### Responsibilities:

- Obtains funding
- Leads own projects
- Acts as Co-Investigator or analyst on other projects
- Consults on project design
- All administration
- Budgets & tracks qual work
- Trains non-qual staff on qual methods & analysis



## Formal Qualitative Core

### Setting:

- Multiple experts
- Robust infrastructure
- Qual Core Director(s)
- May have qual staff
- May have qual admin staff or delegate admin tasks
- May have funding

### Responsibilities:

- Experts obtain funding, lead projects, act as Co-I on other projects, consult
- Director(s)/qual admin may hire qual staff, contribute to performance reviews, assign staff to projects, develop budgets, track qual effort, provide & coordinate training, consult



# COMPOSITION OF QUALITATIVE STAFF

- **Qualitative staff by site range in size from 1-20+**
  - Who is included as part of or takes part in qual core varies by site
- **Some sites have only PhD qualitative investigators, whereas others have Bachelors, Masters, and/or Doctorate-trained staff**
- **Roles within Qualitative Cores vary**
  - Core Directors, Co-Directors, Program Manager
  - Investigators, Co-Investigators, Methodologists
  - Team Leads, Analysts, Interviewers, Implementation Specialists
  - Software Consultant
  - Consult Group Coordinator
  - Transcriptionists



# SUPPORT FOR QUALITATIVE CORES/STAFF

- **45% of reporting sites offer support for administrative work related to Qualitative Cores**
  - 15-20% FTE coverage
  - Although FTE may be available, it is not always feasible to use this protected time due to overall project workload
- **27% of sites report support for professional development**
  - Speaker series
  - Participation in external qualitative trainings



# QUALITATIVE CORE MEETINGS

- **Frequency varies from weekly to monthly; ~25% of sites report they do not regularly meet**
- **Meetings include a range of participants**
  - All VA researchers, to qualitative research staff in & out of VA, to only qualitative core/staff
- **Meeting content also varies**
  - Administrative: Core coordination & Consultation
  - Professional development: Presentations on qualitative projects/studies, those that are in progress and findings



# TYPES OF PROFESSIONAL DEVELOPMENT

- **Qualitative Trainings**
  - Methods, analysis, interviewing, implementation science, theory, software, dissemination
  - Range from occasional offerings to multiple-day workshops
- **Center-wide trainings that include but are not exclusively qualitative**
- **Project/team/group (fellows) trainings**
- **Journal clubs**
- **Works in progress**
- **External trainings**



# TRAINING TOPICS

## Qualitative Methodologies

- Site visit standards
- Observations
- Interviewing /grounded interviews /guide development
- PhotoVoice
- Mixed Methods
- Ethnography

## Qualitative Analysis

- Rapid analysis
- Coding
- Data trustworthiness, transferability, reflexivity

## Implementation Science

- Facilitation
- Tracking/analyzing imp strategies & adaptations
- Periodic Reflections
- Implementation strategies
- Applying imp sci frameworks

## Dissemination

- Presentations (e.g., best practice)
- Comics
- Publishing qual studies
- Qual Checklists (COREQ, SRQR)
- Creating qual posters & visual abstracts



# RESEARCH DESIGN & INSTRUMENT DEVELOPMENT SUPPORT

- **90% of reporting sites provide consultations**
  - Formal & informal
  - Includes: grant proposals, interpretation of qualitative data, technical issues, manuscripts
  - Open houses provide group consultation
- **Grant reviews by qualitative staff for qualitative work are required at 63% of sites**
  - Methodological, timeline, &/or budgetary reviews
- **63% of reporting sites offer interview guide reviews**



# ADMINISTRATIVE WORK

- **45% of reporting sites formally assist with hiring qualitative staff**
  - Other sites assist informally or by request
- **36% of reporting sites track qualitative effort allocated to projects**



# EQUIPMENT, SOFTWARE & TRANSCRIPTION

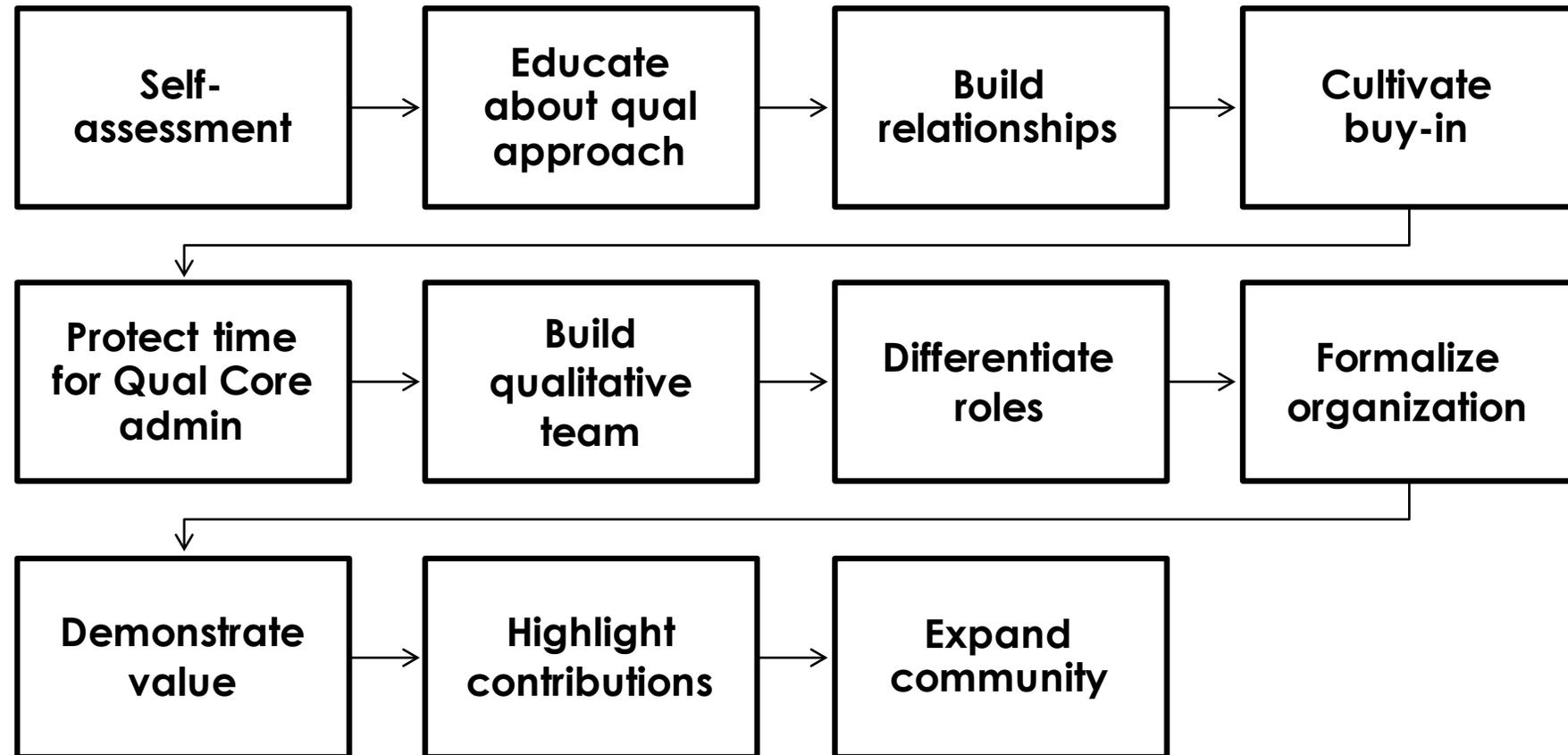
- **Work identifying approved software & equipment falls on individuals when there is no Qualitative Core**
  - 45% of reporting sites use Nvivo; Atlas.ti, MAXQDA, Dedoose also used
  - There is variation in DVR use – most reporting sites prefer Olympus or Philips Brands
  - Digital Voice Recorders are necessary equipment, yet DVR security can be a persistent barrier
- **36% of reporting sites provide limited or full transcription services onsite**



# STRATEGIES FOR DEVELOPING & STRENGTHENING QUALITATIVE CORES

Cores improve overall performance, quality & outcomes of qualitative work

- Practice & learning community
- Mentoring & professional development
- Coordination of qualitative effort



*\*Does not have to be sequential*



# CONCLUSIONS

- **Qualitative research in VA is maturing, but opportunities to grow exist**
  - QMLC members have advanced training (ie 43% PhD; 23% MPH)
  - 78% of QMLC members have intermediate or advanced qualitative research experience
  - Roughly half of COINs have representation in QMLC
- **Interest in QMLC demonstrates a substantial need in the field**
  - Rapid growth & size indicates desire for a community of qualitative researchers within health services
  - Members of QMLC have extensive experience, but want more advanced training & support
  - Mixed methodologies, rapid qualitative analysis, evaluation & implementation, some of which are currently offered as trainings



# CONCLUSIONS

- **Substantial variation in organization of qualitative research**
  - Investigators without infrastructure & resources of a formal core to fully staffed & supported Qualitative Cores
- **Most sites consult on design & conduct of qualitative research**
- **Less than 50% of sites support administrative work associated with Qualitative Cores, yet the work is extensive**
  - Hiring, budgeting, tracking, coordinating, training, mentoring, consulting, reviewing, managing equipment & software
- **VA has an opportunity to be a leader in the field**
  - Large, national community of experienced qualitative researchers
  - 25% of members are from institutions other than the VA



# CONSIDERATIONS MOVING FORWARD

- **What does the qualitative community need?**
  - More advanced training opportunities
  - Better representation of the full breadth & depth of qualitative & ethnographic approaches contributing to health services research
  - More mentorship at every level
  - Qualitative experts on editorial boards, grant review committees
- **What do centers need?**
  - More qualitative & mixed-methods investigators
  - Need for full array of qualitative staff, e.g. mid-level coders
  - Opportunities for career advancement
  - **Thoughtful approach to staffing that allows everyone to work to the top of their scope – quantitative cores could be a model**

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## How to join QMLC:

- complete the intake survey

[https://survey.iad1.qualtrics.com/jfe/form/SV\\_1ZBs587C95jXIYh](https://survey.iad1.qualtrics.com/jfe/form/SV_1ZBs587C95jXIYh)

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Next QMLC cyber-seminar is scheduled for  
April 8<sup>th</sup> - noon to 1 PM EST



# Discussion

*Thank you for your time and attention!*

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