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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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
POLL QUESTION #1

• Does your department/VA have a Qualitative Core?
  – Yes
  – No
  – Unsure, Maybe?
• 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
• 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
• 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
• 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
QMLC SURVEY RESULTS
N=200 (of 250 members)
• 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
QUALITATIVE EXPERTISE

<table>
<thead>
<tr>
<th>Area of Expertise</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qualitative interviewing</td>
<td>142</td>
<td>85%</td>
</tr>
<tr>
<td>Qualitative analysis</td>
<td>136</td>
<td>81%</td>
</tr>
<tr>
<td>Qualitative coding</td>
<td>132</td>
<td>79%</td>
</tr>
<tr>
<td>Qualitative interview guide development</td>
<td>129</td>
<td>77%</td>
</tr>
<tr>
<td>Qualitative codebook development</td>
<td>113</td>
<td>67%</td>
</tr>
<tr>
<td>Mixed methods combining qualitative and quantitative data</td>
<td>82</td>
<td>49%</td>
</tr>
<tr>
<td>Rapid qualitative analysis</td>
<td>68</td>
<td>40%</td>
</tr>
<tr>
<td>Formative evaluation</td>
<td>64</td>
<td>38%</td>
</tr>
<tr>
<td>Feedback loops to sites with qualitative implementation data</td>
<td>33</td>
<td>20%</td>
</tr>
</tbody>
</table>
“WHAT ARE YOU HOPING TO GET OUT OF THIS QUALITATIVE LEARNING COLLABORATIVE?”

- To learn about more advanced topics in qualitative methods: 164
- To speak with colleagues about current analysis work and get suggestions and advice: 134
- To share lessons learned in conducting qualitative research methods: 110
- To learn about publishing studies which use qualitative methods: 109
- To understand how qualitative methods are used in the healthcare field: 104
- To learn about which qualitative methods to use and how: 50
- To learn about qualitative methods - starting as a novice: 39
- Other (Please Specify): 18
QMLC AFFILIATION BREAKDOWN

Not affiliated w/ the VA (N=45) 23%

Yes, affiliated w/ the VA (N=155), 78%
Scoping Review of Qualitative Research Infrastructure
Researchers from 11 sites contributed information about qualitative work and its organization.
Participating sites represent roughly half of VAs with qualitative researchers

(Are we missing you? Contact Jane.Moeckli@va.gov)
SITES PARTICIPATING IN SCOPING REVIEW

Participating sites represent roughly half of VA HSR&D COINS

(Are we missing you? Contact Jane.Moeckli@va.gov)
### TYPOLOGY 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 Group
- **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
• 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
• 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
• **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**
• 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
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
How to join QMLC:

- complete the intake survey
  https://survey.iad1.qualtrics.com/jfe/form/SV_1ZBs587C95jXIYh

- Next QMLC cyber-seminar is scheduled for April 8th - noon to 1 PM EST
Thank you for your time and attention!

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