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HEALTH  
CARE

Defining  
**EXCELLENCE**  
in the 21st Century

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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)

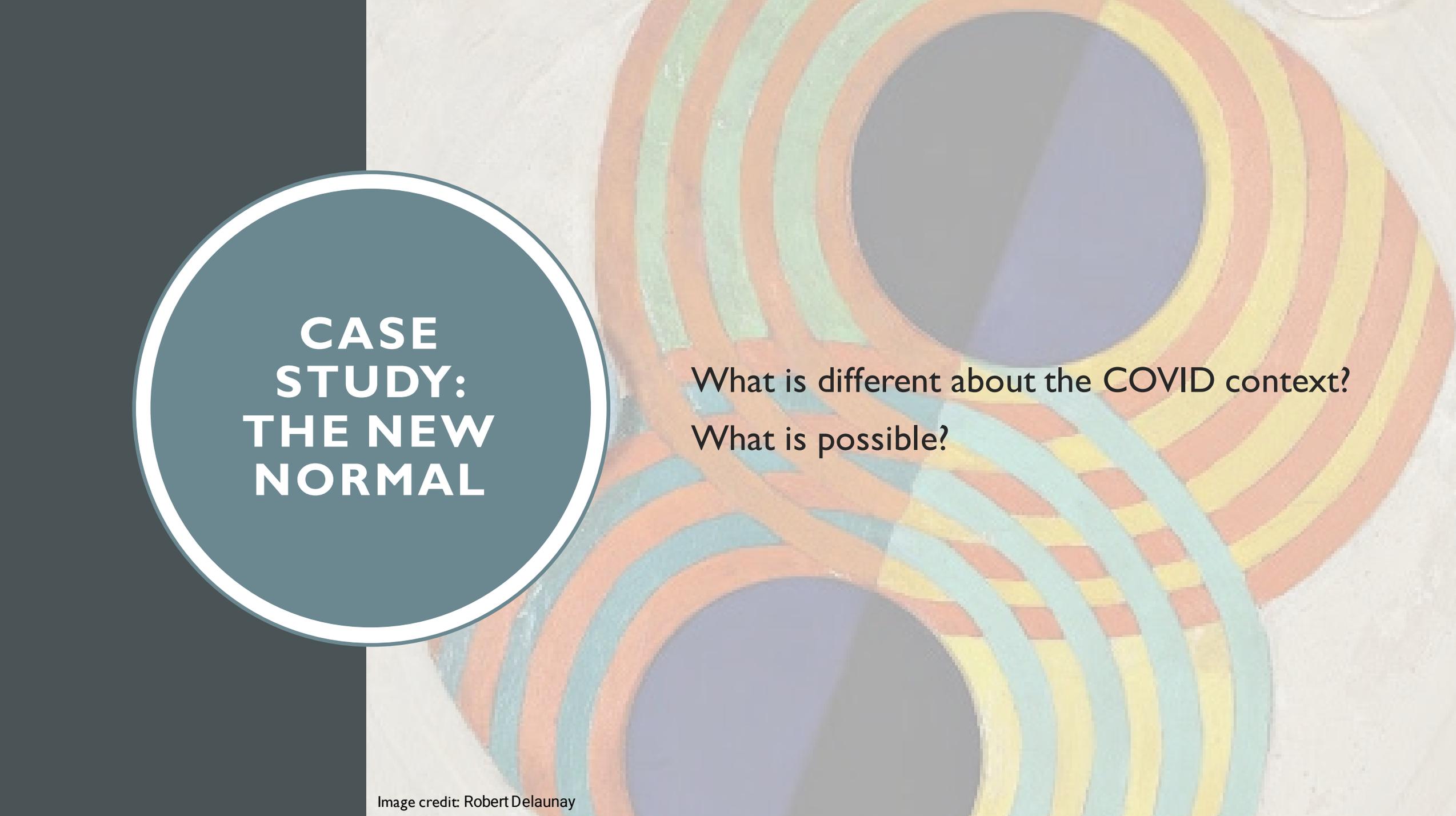
- Ethical challenges
- Regulatory approval
- Recruitment
- Data collection logistics
- Changing research context creating uncertainty
- Transitioning pre-COVID study designs/budgets/teams to new COVID-sensitive protocols
- Describing methods in manuscripts
- Lack of institutional guidance
- N/A – I have 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



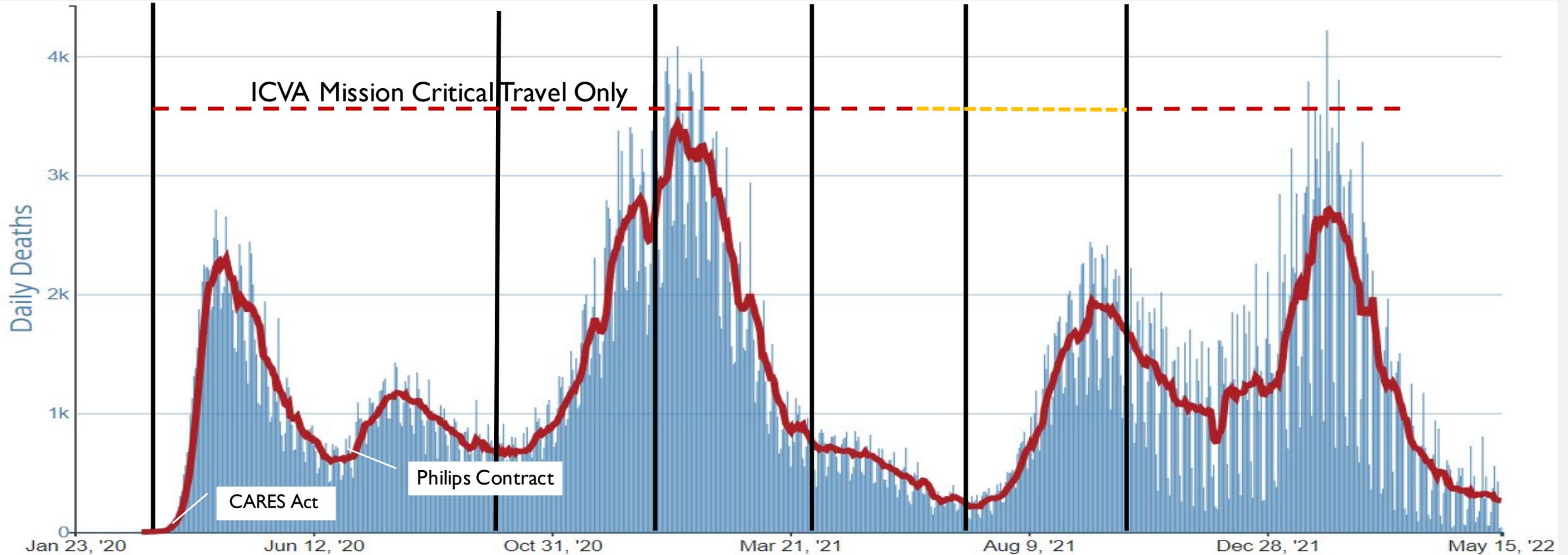
FY21 Q1  
Structured Interviews

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](https://covid.cdc.gov/covid-data-tracker/#trends_dailydeaths), accessed 5/17/2022

# THE NEW NORMAL

Proposal Submitted

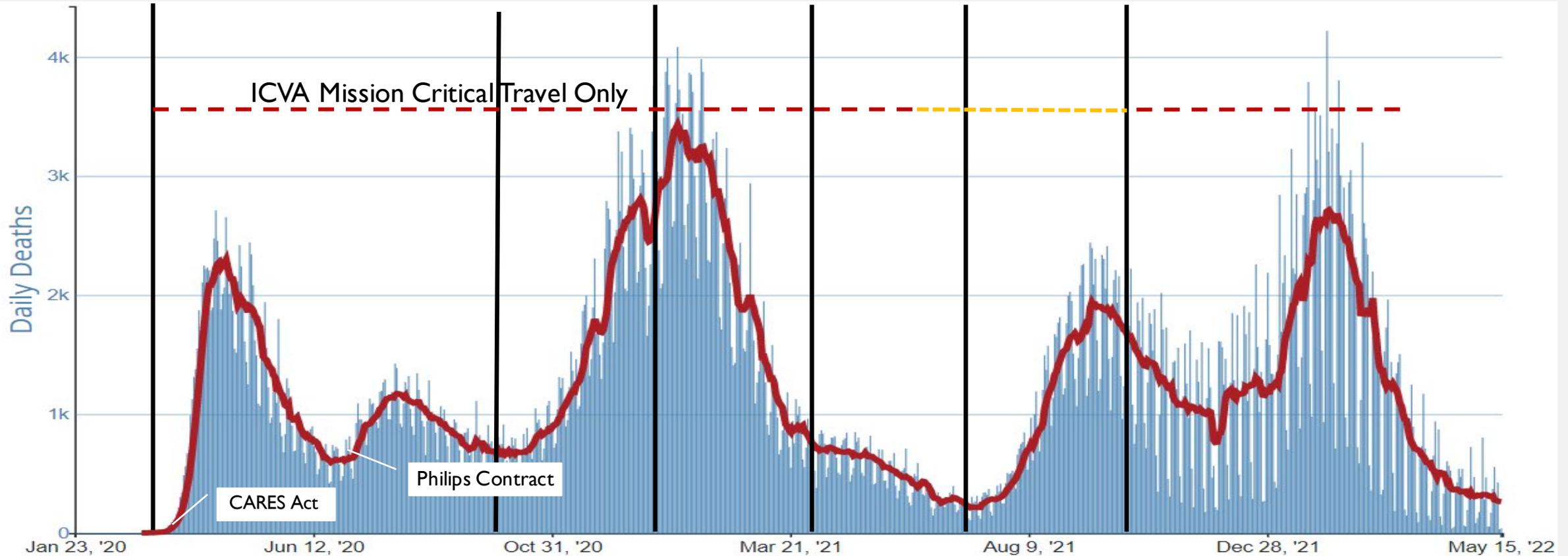
**WHAT HAPPENED**

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](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 the 'NTLive Launch' team chat. The 'Posts' tab is selected and highlighted with a red box. A post from Krystal McKinney at 11:00 AM is titled 'Game plan' and contains the text: 'Hey all, let's get all the designers together to make sure we are on the sa...'. Below the post is a document attachment named 'JulyPromotion.docx'. A reply from Serena Davis at 11:00 AM is titled 'Scheduled a meeting' and is highlighted with a red box. The meeting details are: 'All hands - March 21' on 'January 7, 2021, 10:30 AM - 11:30 AM'. Below the meeting card, it says '15 replies from Oscar, Babak, and Cecily'. A reply from Kian Lambert at 11:23 AM is visible below the meeting card. The chat input field at the bottom says 'Type a new message'.

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 a smaller window for another participant. A 'Transcript' pane is open on the right, showing a list of messages from participants including Jacqueline Simons, Marie Beaudouin, Babak Sharmas, and Daniela Marsden. The transcript text includes: 'Welcome to the team, Babak!', 'Great to meet you. Really looking forward to working with you.', 'Thanks for the intro, Charlotto, it's a pleasure to meet you all today.', 'So what did you all think of today's kickoff meeting for the new building project?', 'It's very exciting. I've already been thinking about some ways the buildings can be designed.', 'We're off to a great start. Let's keep the momentum going.', and 'I'm going to...'. A 'Stop transcribing' button is located at the bottom of the transcript pane.

# 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

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

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Increased specificity results in actionable findings

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Captures data that may otherwise be missed

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Enables prolonged engagement

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Reduces burden and cost

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Easier to get permissions and buy-in

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Increases data heterogeneity, diverse perspectives

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# CHALLENGES & CONSIDERATIONS

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## Methods and Rigor

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Access & control

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Scoping data collection

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Analysis

---

## Ethical considerations

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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

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In-depth, semi-structured interviews

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Gender-expansive participants

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Designed during COVID

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Conducted using Zoom

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Treat data like HIPAA-level data

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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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## ACCESSING COMMUNITIES VIRTUALLY

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

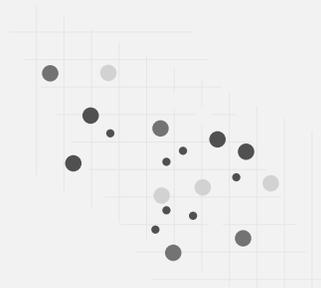
What does this mean for community-engaged research?

# 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

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

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

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

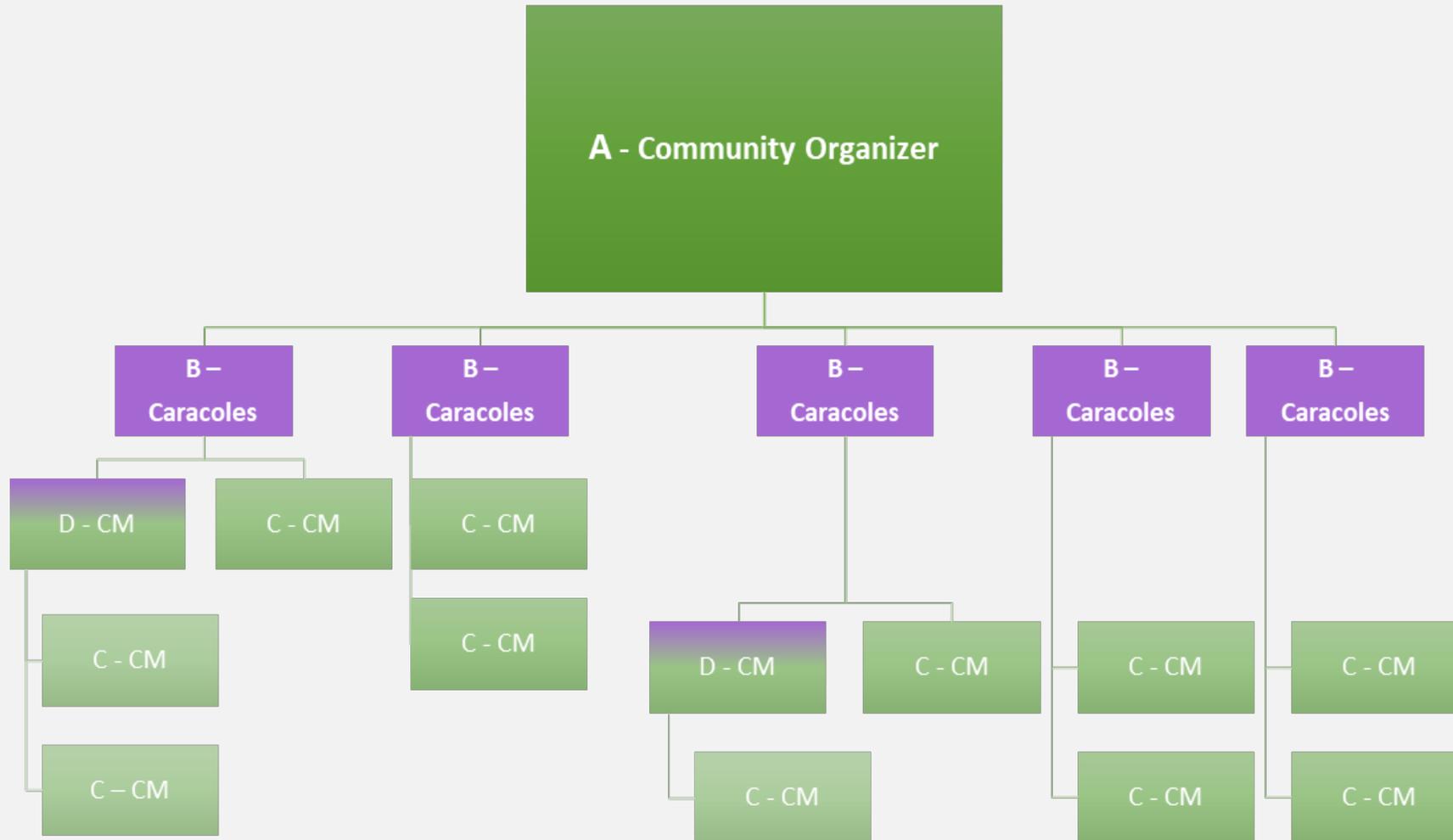
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4 rounds of data collection (Mar–Dec 2020)

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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<sup>1,2</sup>  | Maria de Jesus Diaz Perez PhD<sup>3</sup> | Theresa Trujillo BA<sup>4</sup> |  
Yesenia Beascochea BA<sup>4</sup> | Joe Sammen MPH<sup>4</sup>

- 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.
- Braun, V., & Clarke, V. <https://www.thematicanalysis.net/>
- Digital Anthropology for the American Anthropological Association: <https://0lanthropology.wordpress.com/>
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- Hine, C. (2015). *Ethnography for the Internet: Embedded, Embodied and Everyday*. Routledge.
- Hine C. (2000). *Virtual Ethnography*. SAGE Publications.
- Howlett, M. (2022). Looking at the 'field' through a Zoom lens: Methodological reflections on conducting online research during a global pandemic. *Qualitative Research*, 22(3):387-402.
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- Pink, S., Horst, H., Postill, J., Hjorth, L., Lewis, T., & Tacchi, J. (2015). *Digital Ethnography: Principles and Practice*. SAGE Publications.
- Rose, G. (2016). *Visual Methodologies: An Introduction to Researching with Visual Materials* (4<sup>th</sup> ed.). SAGE Publishing.
- Salmons, J. (2014). *Qualitative Online Interviews: Strategies, Design, and Skills* (2<sup>nd</sup> ed.). SAGE Publications.
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- Woodyatt, C.R., Finneran, C.A., & Stephenson, R. (2016). In-Person Versus Online Focus Group Discussions: A Comparative Analysis of Data Quality. *Qual Health Res*, 26(6):741-9.

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- University of Iowa
- VA Puget Sound Health Care System
- Rocky Mountain Regional VA Medical Center
- University of Colorado School of Medicine

## Questions? Ask us!

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