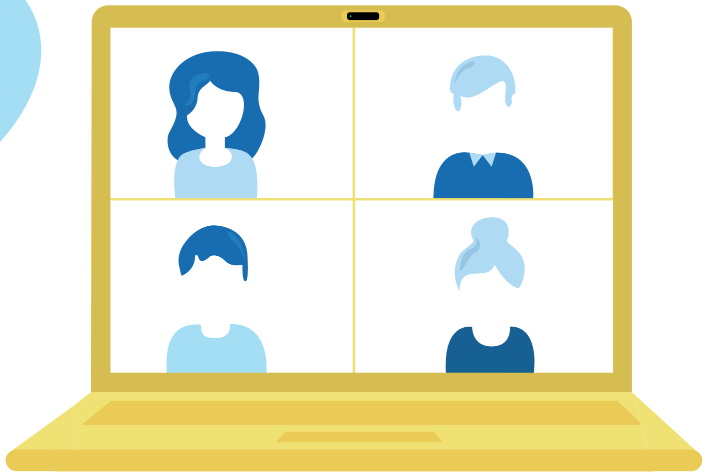
A How-to-Guide for virtual qualitative data collection

WHAT

A guide comprising recommendations and practical tips to consider when planning and conducting virtual synchronous qualitative data collection was developed.



HOW

A scoping review between 2010 and 2022 was conducted and information from 70 articles was extracted and used to develop the recommendations.

FOR WHOM

These recommendations are intended for graduate students and researchers who are novice to or have experience in qualitative virtual data collection.

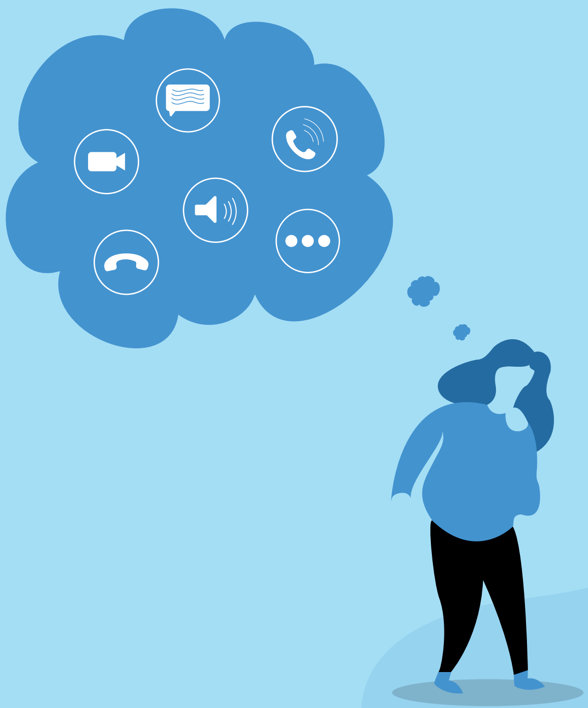
Click here to access the article :
https://doi.org/10.1177/16094069231214679

Before data collection

part 1

1 Consider appropriateness of virtual format

- The population you are working with (e.g. technological literacy, sociodemographic background, harder-to-reach population)
- The research question that needs to be answered (e.g. sensitive topics, need for in-person support and empathy towards participants)
- The cost/fees of the virtual platform
- That data collection is taking place in the participant's environment (which may be more comfortable but could introduce increased external distractions)
- The reduction of non verbal feedback (e.g. computer camera at face level only)
- Strategies to increase virtual participation :
  - Allocate additional budget to provide technology access to participants (e.g. computer, internet, videoconferencing platform)
  - Compile a list of community resources for accessing technology (e.g. library, community centers)



2 Selecting the platform

- Is it approved by your Institutional Review Board?
- Is the research team familiar with the platform?
- Are your participants likely to be familiar with the platform or find it easy to use?
- Does the platform ensure safe data storage?
- Does the platform provide quick and easy access to transcripts?

Before data collection

part 2

3 Strategies for obtaining electronic consent

- Using an electronic form (e.g. Qualtrics, REDCap, DocuSign)
- Recording audio or video consent
- Requesting participant's reply to an email containing the consent form

4 Screening participants' technological literacy

- Send a short questionnaire to assess participant previous experience with platform
- Provide written instructions on how to use the platform
- If needed, schedule a short session beforehand with participant to provide guidance and answer questions

5 Plan for data collection process

- Schedule two persons for online focus groups: moderator and technical support
- Foresee one person for individual interviews
- Develop a session guideline outlining all the steps to be carried out during data collection
- Include the set-up of a back-up plan in case of technological issues

6 Remind participants

- Send a reminder to participants of time/ date of meeting
- Verify technology readiness

During data collection

part 1

1

Number of participants

- For online focus groups, aim for lower number of participants (4-6) than during face-to-face focus groups

2

Length of data collection process

- Plan an additional 15 to 30 minutes of time in case there are technological issues

3

Establishing rapport

- Researchers should plan for warm-up period, which may include information about themselves
- Interviewer/moderator should exchange emails with participants beforehand

4

Ensuring confidentiality

- Restrict platform access to invited participants only
- Promote the use of headsets to reduce background noises
- Promote the use of a neutral or virtual background
- Allow participants to use their real name or an alias during group discussions
- Warn against confidentiality issues when using a public work computer

During data collection

part 2

5

Conducting data collection

- Moderator or interviewer must know the steps of the data collection session
- Join the platform 15-30 min before meeting (researchers and participants)

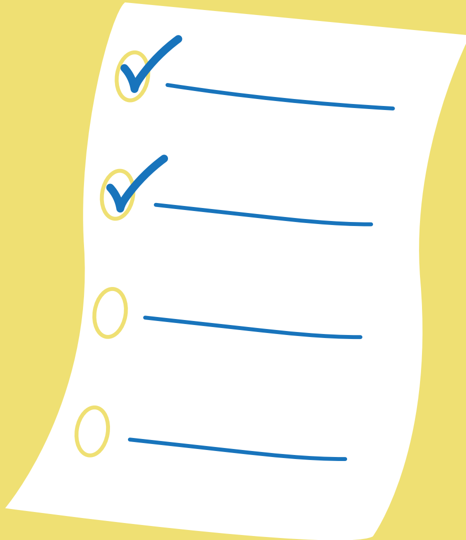
- Individuals in charge of technical support must be aware of potential bugs and ensure they know how to fix them.
  - The chat option may be used to interact with participants needing help, to avoid a disruption in the flow of conversation
  - Test audio/video of each participant to ensure it is working well
  - Show raise hand function to participants to indicate they want to interact
  - Request that participants mute themselves when they are not talking

- At the start, use visual support to present purpose of session, sequence of events and role of each team members (if applicable)
- During the interview, researchers should look up toward the camera rather than at their image on the screen to maintain "eye contact" with the participant

After data collection

Taking the time to look back

- Make sure that participants are well before leaving the meeting
- Provide a list of resources (e.g. helplines or referrals to health professionals), if needed
- Collect participants' feedback on their experience



Collect feedback from participants

How would you rate your experience?

Were the questions relevant?

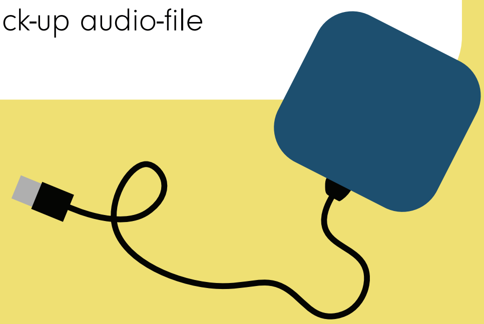
Were you able to express yourself sufficiently?

Did you feel respected? Did you feel listened to?

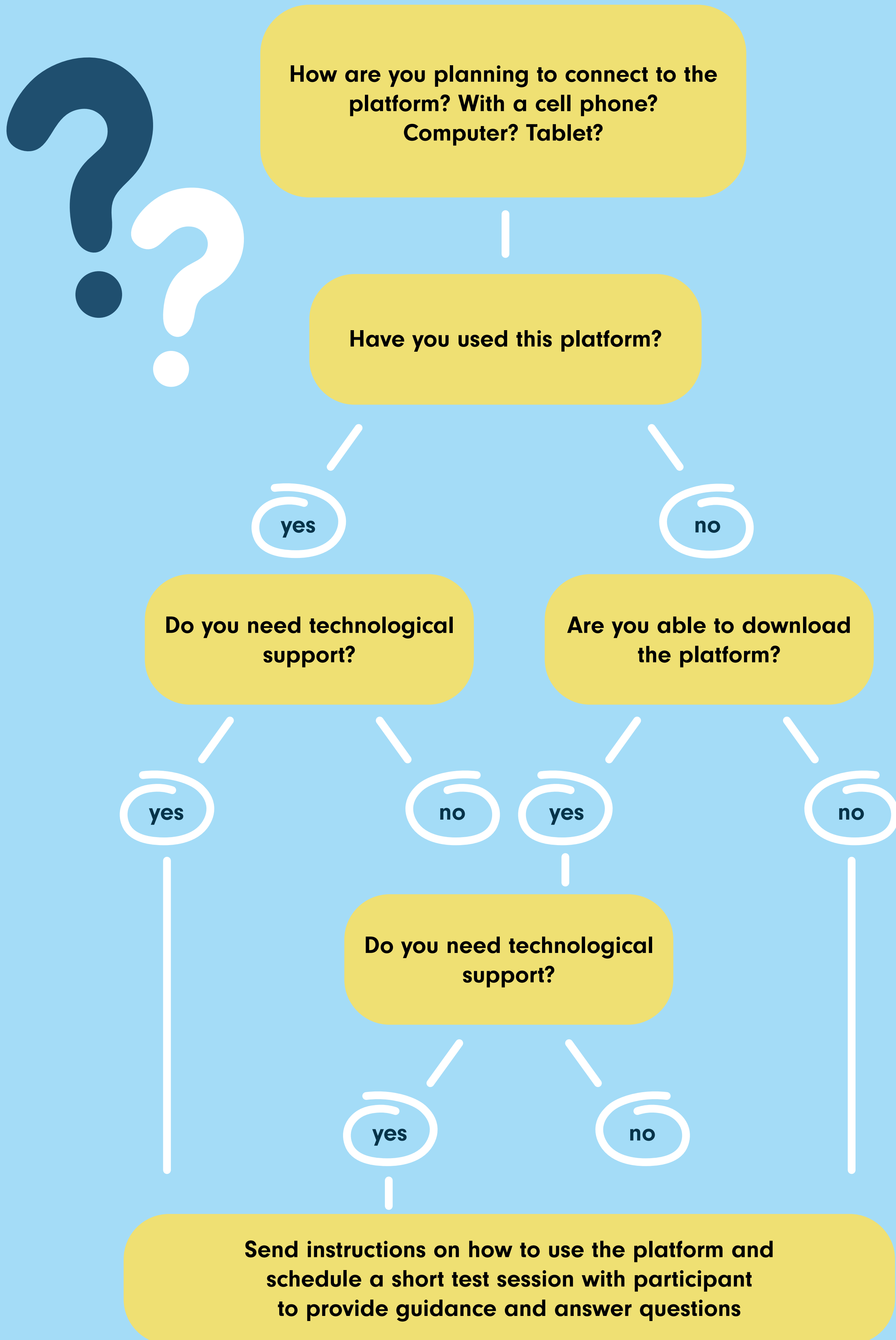
How would you rate the online platform?

Storing data

- Store data on an external drive instead of the cloud to ensure confidentiality
- Keep a back-up audio-file



Guiding documents



Guiding documents

Focus group session guideline

1. Accept attendees in a waiting room with a co-host. In the waiting room, confirm the participant identity. Remind the participants that they can change their screen name to allow confidentiality between participants
2. Once all the attendees joined, lock the meeting
3. Present the research team
4. Review the platform's functionalities (raise hand, mute, etc.)
5. Introduce the rules of exchange (e.g. raise hand, avoid simultaneous speaking, etc.)
6. Remind participants that recordings, photography, or screenshots are not permitted, and that confidentiality cannot be guaranteed in a focus group setting
7. Explain the project objectives and participant contribution
8. Emphasize that we are interested by their experiences and that there are no right or wrong answers
9. Confirm the authorization to record
10. Introduce participants or let them present themselves if relevant
11. Conduct data collection
12. Conclude with closing remarks (reminder if compensation)
13. Administer a short anonymous survey on the appreciation of the experience if relevant