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RESEARCH ASSISTANT TRAINING MANUAL: FOCUS GROUPS

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Ethics

Conjoint Faculties Research Ethics Board (CFREB): Study ID: REB16-1828. The research team declares no conflict of interest for this study.

Permissions

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Abstract

This manual is a practical training guide for graduate and undergraduate research assistants (RAs) working in the Werklund School of Education, University of Calgary. The purpose of this manual is to train RAs on how to plan and conduct focus groups for qualitative research in the field of education.

Keywords: research assistant, training manual, qualitative research, focus groups.

Introduction

The purpose of this document is to provide information to graduate and undergraduate research assistant (RAs) on how to conduct focus groups for purpose of collecting qualitative research data in the field of education. It also provides information on institutional requirements, such as ethics, the expectations of the principal investigator (PI). Though it may have applicability in other disciplines or contexts, this guide has been specifically prepared for RAs working in the Werklund School of Education, University of Calgary.

This guide is intended to supplement, rather than replace, direction from the PI offered in research team meetings, electronic communications or face-to-face conversations. If you have questions about how to plan or conduct a focus group, check with the project PI.

Overview of The Research Project

Research projects involve several steps, starting an idea and then developing that idea into a project. Here is an overview of what a typical project might involve:

1. **Idea Incubation** – This starts with a concept that a researcher (usually the person who ends up being the Principal Investigator) thinks is worth exploring. This is the pre-proposal stage where broad ideas are sometimes introduced to others for general feedback. This helps the PI further develop those ideas so they are concrete enough for a proposal.
2. **Proposal** – This is a general plan for what a researcher wants to for the project. The proposal will include a literature review, methodology, a timeline and a justification for the research is worth doing.
3. **Grant Funding** – Researchers present their proposal to a funder in order to be awarded a grant to run their project. Grants are usually competitive, so the better the proposal it, the stronger the likelihood that it will be awarded funding. Grants provide the money for research assistants to be paid.
4. **Ethics** – Any project involving the use of animal or human research participants requires ethics approval. The PI will initiate an application to receive approval from the institutional research ethics board (REB). This is an important step in the process as many subsequent steps in project rely on receiving approval from the REB. The PI must receive approval to conduct the study before hiring RAs or collecting data.

5. **Hire RAs** – Once the PI has secured funding and received approval from the REB to conduct the study he or she can then proceed to the next steps of the project. Research assistants can be either undergraduate or graduate students. RAs are employees of the university for the duration of the project. There is a formal human resources process that the PI must adhere to when hiring RAs. Once the RAs have been hired, the research team is complete. You can then begin the project. (Steps 1 through 5 are all preparatory steps to get ready for the project.)
6. **Recruit Research Participants** –Typical ways of recruiting participants include e-mail recruitment or posters. The steps for recruiting individuals to participate in the project must be approved by the REB as part of the ethics application. RAs may or may not be involved in participant recruitment. It depends on the project design and the protocols approved by the REB.
7. **Gather Data** – Data can be gathered in several ways, including focus groups. A research project may involve more than one method of collecting data (e.g. focus groups and surveys). For a focus group, the questions that will be asked during the focus group must be included in the application for ethical approval by the REB. Once the questions are approved, they should not be changed unless the PI submits a request for a project modification to the REB.
8. **Analyze Data** – Once data have been gathered during the focus group, they need to be analyzed. The first step is usually to have the recordings transcribed. This may be done by a member of the research team or by a transcriptionist. Then, one more members of the research team will begin to analyze the transcripts using a process called “coding”. This involves identifying, organizing and sorting key themes that emerge from the data. It is not unusual for more than one person to be involved in the analysis process, as discussion about the results provides a way of cross-checking the data for trustworthiness. This step of the project is likely to take a significant amount of time.
9. **Publish & Disseminate Results** – Once the data have been analyzed, the research team is ready to share what they found. This is generally referred to as “disseminating the results of the research” and can be done in several ways including conference presentations and publications. RAs may or may not be involved in this step.

Typically, RAs are involved in Step 7 – Gathering data. They may also be involved in the analysis phase, depending on how the project has been designed. Only sometimes will they be involved in disseminating the results, at the discretion of the PI.

What Is a Focus Group?

Focus groups are also called "group interviews" or "group conversations". A focus group is a group of people who engage in a discussion guided by a set of questions and moderated by a facilitator. The objective of the focus group is to gather qualitative research data from human research subjects. The kind of data collected in a focus group usually relates to the participants':

- Beliefs
- Perceptions
- Opinions
- Views
- Values
- Experiences

Two criteria make these group discussions "focused":

- A clear and defined topic
- A common set of characteristics among participants (e.g. demographic, professional or other commonalities).

A focus group is comprised of invited participants, a facilitator, and a recorder. They are scheduled and organized. Participants will be advised in advance of the date, time and location of the focus group. Typically focus groups last from 45 to 90 minutes. If a focus group is expected to last more than 90 minutes, either plan a break or schedule another meeting. Participants will likely be restless, tired, or hungry after 90 minutes and may not want to continue.

Focus groups vary in size, with a maximum usually being 12 to 15 people. The larger the group, the more challenging it can be to moderate. If your PI has asked you to run focus groups without him or her present, it is likely that the focus groups will be somewhat smaller. The PI should recognize that you are novice researchers and limiting the number of people per session will help the sessions run more smoothly. A focus group run by student research assistants should not exceed about eight (8) participants.

A focus group is usually located in a place that lets people feel at ease, in an environment that allows people to be heard by each other, the facilitator, and the recorder. The recorder must ensure that every participant's contribution is being captured for future data analysis. Focus group discussions are usually recorded via a digital recording device for later transcription and data analysis.

Focus groups may be used as the sole source for data on a research project, or combined with other methods of data collection.

Specific roles played by RAs in a focus group include either assisting or running the focus group. You may be asked to facilitate the discussion, be in charge of recording data or assist with logistics. Each of these elements is outlined in this manual.

Ethics

All projects conducted at the University of Calgary involving human participants must be approved by the Conjoint Faculties Research Ethics Board (CFREB). Approval for the study is obtained before participants are recruited or focus groups occur. The project PI will prepare and initiate the application to the CFREB.

As research assistants, you must be approved members of the research team, according to CFREB regulations. This will likely mean completing an ethics tutorial that is required of all researchers in Canada called the Tri-Council Policy Statement: Ethical Conduct of Research Involving Humans, 2nd edition (TCPS 2) Tutorial Course on Research Ethics (CORE). Upon completion of the tutorial, you will be issued a certificate in .pdf format. Save your certificate on your computer using a file name you will remember.

You must register with the University of Calgary's Institutional Research Information Services Solution (IRISS). Uploading a copy of your certificate of completion of the TCPS2 CORE Tutorial will be part of that process. You will not be permitted to participate in focus groups or have any contact with research participants until you have been formally added to the research study team.

Once you have been approved by the REB as part of the research team, you should be able to see the entire ethics application online, including a copy of the approval certificate. You may want to download a copy of the approval certificate in case you ever need it.

Focus Group Questions

Since focus group questions must be approved by the university ethics board, it is likely that by the time you join the study team, the questions will already have been determined and approved. The PI will have written questions so that they are unbiased and purposely do not try to “lead” participants into giving a particular answer. Well-written focus group questions are exploratory and open-ended, as they are intended to allow participants to share their ideas, thoughts and beliefs without judgement or influence. Well-written questions are free from jargon or complicated technical terms. They also avoid inflammatory or emotional language.

When you are conducting the focus group it is important to adhere to the approved questions.

Participant Recruitment

Focus group participants are sometimes referred to as “informants”, “key informants”, “research subjects” or “research participants”. For the purposes of simplicity, this training manual uses the term “participants”.

The steps involved in recruiting participants, as well as any recruitment materials (e.g. posters, brochures or even e-mail invitations) must also be approved by the institutional research ethics board. Recruitment cannot begin until ethics approval has been obtained.

Typically, participants will be recruited based on a common set of characteristics or criteria. The PI will have been required to provide the ethics board with a list of these criteria as part of his or her application to conduct research with human subjects.

As RAs, you may or may not be involved in the recruitment of the participants, depending on how the PI has designed the study. Even if you are not directly involved with recruitment, you should have an idea of the selection criteria used to recruit participants.

Limitations of Focus Group Research

Focus groups have particular limitations that must be considered as part of the research design:

- **Generalizability** – Results from focus groups cannot be generalized. Researchers must be careful not to assume that what is said in a focus group represents the opinions, beliefs or perceptions of an entire population. While the objective is to have a focus group that represents the diversity of beliefs, views, and opinions of the larger population, this may or may not actually be the case.
- **Influence of other participants** – This can occur when participants begin to agree with one another due to peer pressure or the perception that agreeing with others is preferable to raising an opposing view point.

Research Assistant Roles

Research assistants are hired in accordance with University policies and procedures. Duties may include, but are not limited to:

- Attend and actively participate in research team meetings.
- Assist with participant recruitment, obtain informed consent and keep accurate records for the project. RAs must keep data confidential and not discuss what was said in a focus group with anyone outside the research team.
- Collaborate with the Principal Investigator and other research team members to implement and maintain protocols for secure storage of data.
- Conduct focus groups.
- Maintain detailed and organized project documentation, including reports, data, etc.
- Assist with literature reviews, documentation and report preparation.
- Assist with clerical work as needed.
- Assist with collaborative knowledge dissemination activities.
- Other duties as assigned.

RAs might participate directly in focus group research in two ways:

1. **Assisting the PI** – In cases like this, the PI will likely moderate the focus group and the RA might assist with logistics, room-set up, arranging for refreshments, setting up the recording device(s) and possibly taking notes during the focus group.
2. **Conducting the focus group** – Research assistants may be called upon to run the focus groups without the PI present. This can occur for numerous reasons including scheduling conflicts for the PI or the PI deliberately not wanting to be present so as not to influence participants. Sometimes having a PI present can create tension or anxiety for participants because of that person's role or level of authority. In the case that the PI is not present, it is preferable that two research assistants conduct the focus group. One will moderate the discussion and the other will set up the recording device(s) and take notes. Both will collaborate on logistics, room set-up and refreshments.

Graduate student research assistants may be referred to as "Senior RAs" and be given more responsibilities. They will likely have taken courses in research methodologies and may have some experience conducting research.

Undergraduate research assistants may be referred to as "Junior RAs" because they are less experienced.

The term "junior" does not mean that undergraduates are in any way subservient to their graduate student counterparts. All RAs are considered full and highly respected members of the research team, regardless of their experience levels.

Planning for the Focus Group

In addition to developing the research questions, recruiting participants and receiving ethical approval to conduct the focus group, there are numerous logistical elements involved in planning a focus group. (See the checklists included as Appendices.)

Room or Venue Booking

The PI may ask you to assist with securing a venue for the focus group(s). This might include obtaining information about venue availability and rates, as well as logistical information about how the venue might need to be booked (e.g. credit cards). If a venue needs to be booked with a credit card, inform the PI.

If the focus group is being held on campus, the protocol to book rooms may involve certain institutional privileges. Your PI may ask you to work with a member of the administrative staff to book a room or he or she may book the rooms directly.

Payments and Purchases

There may be a need for items or services to be purchased as part of the planning process for the focus groups.

Credit cards - As research assistants you should never be expected to use your personal credit card for any reason as part of a research project. This includes booking a venue or ordering refreshments. Any time a credit card is required for a research project, inform the PI and let him or her handle the matter.

Petty cash – The PI may set up a petty cash fund for the project. The details of this should be explained in details by the PI, with expectations for its use outlined clearly.

Sharing Contact Information

You may have an important reason to contact another RA or the PI. Everyone on the research team should share contact information with one another including cell phone numbers.

Communications Protocol and Cell Phone Use

If you need to communicate with a member of the research team on the day of a focus group, texting will be our first line of communication. After that we will use e-mail and then phone calls.

On the day of the focus group, be discreet and judicious with your phone. Keep your cell phone on, but at least 10 minutes before the focus group begins, turn your phone to silent mode. During the focus group, do not use your phone for any purposes not related to the focus group except in the case of an emergency. By this, we are talking about a real emergency, not social calls.

Conducting the Focus Group

There are several factors to consider while running the focus group itself, including who does what. Typically, two people will run a focus group. One person is generally called the "Facilitator". This person will moderate the discussion with the participants. The other person is called the "Recorder". This person is in charge of ensuring data are recorded properly using approved recording devices and taking notes during the focus group.

Recording the Focus Group

The person assigned to the role of Recorder is in charge of ensuring that data are captured effectively and accurately. Focus groups may be recorded in one of three ways, using audio, video or field notes.

If the focus group is the sole source of data for a project, or a particular component of it, then it is probable that a video or audio recording will provide the primary source of data for analysis. Note-taking is usually considered a secondary or back-up way to collect data. Ideally, you want to capture data in more than one way (e.g. recording and field notes). If you are recording a session, it is not unusual to have both a primary and a back-up recording device in case one fails or a recording is accidentally erased. (This can happen more easily than you might think.)

The institutional ethics review board must approve the type of recording(s) that can be used on a project. You must adhere to the institutionally approved methods for recording your focus group. For example, if you have not been approved video record your focus group, do not do so.

Video recording – This kind of recording allows researchers not only to analyze the words participants use when they speak, but also their gestures and body language. If you are video-recording a focus group, be sure the camera is set up to capture all the participants and researchers in the room. Use the video recording device provided to you by the project PI. Do not use your personal mobile devices (e.g. phone or tablet) to video record focus groups unless you have explicit permission to do so from the ethics review board. Practice setting up and using the camera before the focus group runs. Ensure the battery is charged and you have a memory card or other approved data storage.

Audio recording – If you are audio-recording your session, use a high quality digital voice recorder. and have a back-up- recorder available. The project PI should provide you with a recording device to use for focus groups. Do not use your personal mobile device (e.g. phone or tablet) to audio record focus groups unless you have explicit permission to do so from the ethics review board. Practice setting up and using the audio recording device before the focus group runs. Ensure there is a memory card or other approved data storage. Also, be sure you have extra batteries for the device.

Keep any recording devices running until the last participant has left the room. That way, if there are any stragglers who want to make contributions after the main conversation has concluded, you can still capture their input with the recording device.

Field notes – A note-taker may sit in the room while the focus group is in session and take notes throughout as a secondary source for data analysis. He or she should be introduced at the beginning of the session as a member of the research team. This same person may also handle setting up any other recording devices that are used during the session. Be sure to include the following information in your field notes:

- Date and time of the focus group
- Full name of research team member conducting the focus group and their role(s).
- Location of the focus group.
- Names of participants / pseudonyms

See Appendix D of this guide for a helpful template that can assist you in taking notes.

Remember that your field notes become part of the permanent element of the data collection for the research project. You are not writing notes just for yourself, but for the entire research team. Here are a few tips to help you produce high quality field notes:

- Write out complete words. Avoid using short-hand or “texting” shortcuts such as “R” instead of “are”.
- Write out complete sentences. Avoid bullet points and sentence fragments.
- Use quotation marks to denote direct quotations from participants.
- Use brackets or square brackets to indicate editorial or additional comments such as laughter, gestures, body language, etc. Limit the amount of editorial comments you record.

Your primary goal is to objectively capture what the participants said during the focus group.

- Avoid vague indicators such as “he said…” and instead use names, pseudonyms or research participant numbers, as per the project protocol.

Try to be as specific as possible with your notes. Unless you are a highly-skilled and experienced note taker, do not expect to be able to write out every word that is said. Capture the main ideas in complete sentences. The more practice you get taking notes during focus groups, the easier it will become.

A recorder is not meant to be a silent observer unless you are specifically asked by the PI not to engage with participants. Otherwise, you can ask participants to slow down if they are talking too quickly or ask for clarification if you having a hard time taking notes on what someone is saying.

It is not unusual for the Facilitator and the Recorder to work together as equal members of the team. The Facilitator should check in with the Recorder during the focus group to ask if he or she needs clarification on anything, for example. Similarly, if the Facilitator misses or skips a question, it is OK for the Recorder to speak up and say something like, “I think we missed Question 5. Can we go back to that one?”

Room Set-Up

Ensure the room is set up so everyone can see each other. The objective is to create an environment where people feel free to exchange ideas and have a conversation.

Set out refreshments before everyone arrives.

Ensure the trash can in the room is lined with a garbage bag. You will remove any garbage left in the room after the focus group ends and it is easier to do this if you have already lined the trash can with a bag before the focus group starts.

Facilitating the Discussion

Facilitating a focus group is also sometimes called “moderating”. Regardless of the name it goes by, leading a focus group discussion requires skill and acumen. The Facilitator listens to the participants and keeps the discussion moving forward, while remaining completely neutral throughout the process. Remaining neutral does not mean being devoid of emotion. Be pleasant and warm with participants. It is up to the moderator to create a climate that is warm and welcoming for participants.

Before you start asking the focus group questions, be sure to introduce yourself and the Recorder to participants. Ensure that everyone has signed a consent form. If not, have them sign one at the start of the session. You may also ask participants to make themselves name tags. If they have chosen a pseudonym, they should write their pseudonym on their name tag, rather than their real name.

Invite participants to help themselves to water or refreshments. Tell them where the nearest public washrooms are and let them know how long you expect the focus group to take.

Ask the Recorder to start the recording. Remind participants that the session is being recorded. State the date and location of the focus group. From this point forward, refer to participants by their pseudonym if they have chosen one. Avoid referring to participants by their real names on the recording.

Here are some tips to help you:

Manage the time – It is your job to ensure the focus group starts and ends on time and that there is enough time for each of the key discussion questions. Tell participants at the beginning how long the focus group is scheduled for.

Keep participants focused – Sometimes participants try to take the discussion in a direction that is not aligned with your questions. Some participants may ramble or veer off into stories or examples that are not relevant. It is your job to keep them on task and focused.

Ensure everyone participates – Some participants may be more reserved and others may try to dominate the conversation. Ensure everyone gets a change to speak. If you notice someone has not spoken up, it is OK to turn your direction to that person and use a prompt such as, “I’m interested to know your point of view on this. What are your thoughts?" or "I noticed that [Participant] hasn't had a chance to comment on this yet. Let's give him / her a chance to contribute."

Manage those who try to dominate - If someone is dominating the conversation, do not be afraid to say, "OK, thanks for that. Now we need to hear from someone else." If a dominant participants cuts someone else off mid-sentence, you are allowed to say, "Please let [Participant] finish."

Moderating disagreement - Participants are allowed to agree or disagree with one another on their answers. Do not take sides or strive for consensus. The objective is not for everyone to agree, but rather to allow participants to exchange ideas in a candid, comfortable and safe environment. If a participant declares that someone else's opinion offends them, you can say "There are no right or wrong answers in this focus group. We respect everyone's right to have their own opinion." Then, keep the discussion moving forward. Do not allow the group to dwell on one person's dismay or indignance.

Check in with the Recorder – Be sure to treat the Recorder as full partner in the process. Check in with him or her periodically to ask if they need clarification on anything, for example.

Probe for further details – While it is important to stick with the questions approved by the institutional research ethics board, the moderator is allowed to probe for deeper insights by using questions and phrases such as:

- Please give us an example.
- Why is this important to you?
- Does anyone have anything else to add on this point?

Pay attention to stragglers – Some people may wait until the focus group is ending to speak up. If this is the case, take the time to pay attention. You may be asked to supplement the field notes after the focus group to capture that individual's contributions.

Dealing with Interruptions and People Leaving Early

Participants are not required to stay for the entire time. If someone needs to leave early, thank them for participating and graciously allow them to exit.

If the focus group is interrupted by an outsider, make every effort to protect the identities of the participants. Open the door, but then step outside the room immediately, not allowing the outsider to enter the room. If this happens near the end of the focus group time, it could be that the outsider has simply arrived for another meeting scheduled in the same room after the focus group ends. Politely inform the person there is a focus group in session and ask them to return later.

If the focus group is interrupted by a fire alarm, ensure the participants' exit the room quickly. If there are two facilitators, the senior or lead facilitator will lead the group out of the room. The second facilitator will be the last to exit the room, taking all recording devices and confidential documentation (e.g. consent forms) with him or her. Participants' safety is more important than data collection. Ensure all participants and researchers exit the building safely.

Concluding the Focus Group

As you conclude the focus group, be sure these steps have been completed:

- All questions have been asked. Double check with the recorder that you have asked all the questions included on your list. It is easy to miss a question when you are facilitating a session. Checking in with your recorder helps to ensure you have captured all the necessary data.
- All consent forms have been signed and gathered.
- Participants have been thanked for attending.
- If there is an incentive (e.g. gift card) for participants, ensure each person receives their gift on the way out.

Thank everyone for attending the focus group. Be sure to tell participants that we value their time and effort. Reinforce that research is being done for them and with them. Also, remind participants that the focus group is meant to be confidential and they should not discuss the focus group with anyone.

Let people know how the results of the work will be disseminated (e.g. reports, conference presentations, etc.) If there are public presentations planned to share the results of the project, let participants know they are welcome to attend. If there are follow-up groups or other meetings that participants should be aware of, remind them of these too.

Participants should leave the focus group feeling valued and appreciated.

After the Focus Group

Vacating the venue

Ensure that you leave the venue in the same condition you found it. This includes, but is not limited to:

- Arranging tables and chairs neatly. Tuck chairs underneath the tables.
- Remove any food, drink or garbage from the room. Note that if you are hosting a focus group on campus, the garbage is not picked up from some meeting rooms daily. Tie up any garbage bags in the room and remove the garbage when you leave the room. Deposit the garbage in a trash can in a publicly accessible area (e.g. in a hallway near the elevators) so the waste will be removed that same day, or in a dumpster outside.
- Turn off the lights.
- Double-check the door to ensure it locks behind you.

Debriefing

Take some time after the focus group to debrief. This can be done at the focus group venue or some other place, providing it is private and you cannot be overheard. The debrief includes the Facilitator and Recorder at a minimum. The PI may asked to be involved with the debrief. If this is the case, make arrangements to include the PI (e.g. by phone). During the debrief the Facilitator and the Recorder discuss what worked and what didn't. All aspects of the focus group can be included in the debrief including the venue, the process, the recording and any other elements that are worth noting. Some questions that you might think about for your debrief are:

- In general, what worked well?
- How was the venue?
- Could everyone see and hear each other OK?
- Was the environment comfortable (e.g. not too cold, too hot, etc.)?
- Did the recording work?

- Did participants understand the questions?
- Was there any confusion among participants about the questions or the process?
- Did you get usable data?
- What points do you need to pay attention to for next time?

The Recorder should jot down some notes from the debrief as part of his or her field notes for that session, but should also have a chance to actively contribute to the debrief through the conversation.

Preparing data for analysis

There are a few steps that need to be completed to prepare the data for analysis:

- Ensure your field notes are legible and comprehensible. Review them to ensure what you wrote down actually makes sense.
- Ensure data are anonymized. Participants' real names should not appear anywhere except on the consent forms unless they have specifically requested that their real names be used.
- Make a back-up of your recording. One copy will be used for transcription. The other copy will be kept in the project archive. Do not send the transcriptionist your only copy of the recorded data!
- Ensure the recording is saved in the appropriate format. If you are working with a professional transcriptionist, ensure the recording is saved in his or her preferred format.

Transcribing the recording

Recordings may be sent away to a professional transcriptionist or they might be done by a member of the research team. Check with the PI about which approach will be taken for your project.

Data analysis

Data analysis for the focus group will likely be led by the project PI, with the assistance of RAs. He or she will guide you through the data coding and analysis process.

In general, focus group analysis will involve systematically identifying and summarizing:

- Themes
- Patterns
- Perspectives
- Perceptions
- Experiences

Reporting the results

Focus group results can be reported in various ways including:

- Technical report
- Poster presentation
- Conference presentation
- Journal article

The PI will advise you on how the results of the project should be reported. Remember that results are to be kept confidential until the PI is ready to release them.

Intellectual Property Statement for Research Assistants

The purpose of this statement is to ensure clarity and transparency among all members of the research team. According to the University of Calgary Intellectual Property Policy:

“Persons paid to perform specific assigned tasks unrelated to their academic program are employed and, in the absence of another agreement, their work belongs to their employer” (p. 13).

The intellectual property rights for this project technically rest with the Principal Investigator (PI). Research Assistants may not claim outputs or results from this work as their own without the explicit permission of the PI. Research Assistants (RAs) are hired to perform specific duties and tasks in relation to the project, but this does not entitle RAs to intellectual property rights.

RAs may not copy, publish or publicly share results or any other work relating to this project without the explicit written permission of the PI.

Under certain circumstances RAs may be invited to contribute to collaborative dissemination of research results (e.g. conference presentations or publications). The PI would extend an invitation to collaborate based on the depth and substance of intellectual contributions made by RA to the research project.

Research assistants are encouraged to have open and frank conversations with the PI about what constitutes a substantive intellectual contribution to a research project.

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Appendix A: Checklist: Supplies

- [ ] Two (2) Digital recorders
- [ ] Extra batteries
- [ ] Name tags
- [ ] Markers
- [ ] Extra consent forms
- [ ] Extra pens
- [ ] Watch /clock / phone
- [ ] Attendee list
- [ ] Refreshments
- [ ] Napkins / paper plates / cups
- [ ] Garbage bags

Appendix B: Checklist: One day prior to focus group

- ☐ Ensure digital recorders are in good working order.
- ☐ Ensure you have extra batteries for digital recorders. (If not, buy extra batteries.)
- ☐ Order refreshments.
- ☐ Assemble or review the contents of your Focus Group Kit to ensure have:
    - name tags
    - markers
    - pens
    - attendee list
    - extra consent forms
    - recording device(s)
    - extra batteries for recording device(s)
    - napkins
    - paper plates
    - cups
    - garbage bags
- ☐ Find the room where the focus group will be held and print off a map, if needed.

Appendix C: Checklist: Day of focus group

- ▢ Arrive early to the venue / room.
- ▢ Set up tables and chairs so everyone can see one another.
- ▢ Set out refreshments, name tags and markers.
- ▢ Set up digital recorders.

Appendix D: Template for Taking Field Notes

This template can help you take effective notes during a focus group. Adapt it to each focus group as appropriate. Remember to include notes about unusual occurrences such as interruptions.

<table>
<tr><td colspan="4">Research Project Title:</td></tr>
<tr><td>Date:</td><td>[Day, month, year]</td><td>Time:</td><td>Include both start and end time.</td></tr>
<tr><td>Location:</td><td colspan="3"></td></tr>
<tr><td>Researchers:</td><td colspan="3">[Write out full names of research team members involved in the focus group.]</td></tr>
<tr><td>Participants:</td><td colspan="3">[Write names or pseudonyms of participants, as per research project protocol).</td></tr>
<tr><td>Q1:</td><td colspan="3">[Write out the question in full so you know which responses pertain to which question. Write our participants responses as fully as you can. Use quotation marks to denote direct quotations from participants.]</td></tr>
<tr><td>Q2, etc.</td><td colspan="3">[Same steps as Q1.]</td></tr>
</table>