Educational Goals And Objectives

- Identify the major elements of primary care qualitative research reports
- Understand best practices for organizing and composing primary care qualitative research reports
- Evaluate the quality of published primary care qualitative research articles via the use of rubrics and manuscript checklists
- Identify strategies to segue better from conceptualizing and conducting their primary care qualitative research to composing their qualitative research reports
Outline of Session

I. Introduction to Writing Primary Care Qualitative Research Well

II. Creating a Coherent Flow between Conducting and Reporting Primary Care Qualitative Research

III. Matching Research Purpose and Research Audience and Stakeholders with Representational Style

IV. Best Practices for Organizing and Composing Primary Care Qualitative Research Reports

V. Appraising Published Primary Care Qualitative Research
Part I

Introduction to Writing Primary Care Qualitative Research Well
Goal of Reporting Qualitative Research

- To report qualitative differences that make a difference with confidence

- To report is to make tacit knowledge public

- Qualitative means related to quality and quality means essential or distinctive characteristics, properties, traits, or attributes

- Confidence = Quality of Transparency + Coherence
Quality Components

- Transparency
- Coherence
Transparency

- Choices Made
- Simplicity
- Active Voice
- First Person
Coherence

- Conceptualization to Operationalization
- From the Field to the Desk
- Within Unit
- Across Units
Challenges

- Instrumentation
- Qualitative Nature
Instrumentation

- Self-of-the-Researcher
- Site and Sample Selection
- Data Generation and Collection
- Data Analysis
- Reporting
- Quality Control
Qualitative Nature

- Qualitative
- Abstraction
- Analysis
- Synthesis
Ethics and Integrity

- Authorship
- Responsibilities
- Conflicts
- Fabrication
- Falsification
- Plagiarism and Self-Plagiarism
- Redundant Publication
- Fragmented Publication
- Under-Reporting Research
- Citations and Acknowledgments
Design As Destiny

Grounded Theory

Collect, Code, & Analyze

Grounded Theory
Qualitative Case-Control Study

Outcome Present?

Yes

Factors?

No

Factors?
Part II

Creating a Coherent Flow between Conducting and Reporting Primary Care Qualitative Research
The Four Studies Model

- The Study Proposed
- The Study Conducted
- The Study Reported
- The Study Evaluated or The Study of the Study
| Study Proposed         | - Proposal  
|                       | - IRB Protocol |
| Study Conducted       | - Data       
|                       | - Results    |
| Study of the Study    | - Notebook / Diary  
|                       | - Audit Trail |
Three Studies Into One

Study Report

Proposal & Prospectus

Data & Results

Journal & Audit Trail
4-T Qualitative Data Analysis

- **Target**: The portion of the text that has caught your interest
- **Tag**: The name you give to the target that reflects the meaning you ascribe to it
- **Tale**: The story of the tag’s meaning in relationship to the target in which you make the evidential qualities of the target in support of your tag overt
- **Thesis**: The proposition that connects the patterns reflected across the tales of the tags’ relationships to their targets
4-T Qualitative Reporting

- Thesis: The prose that connects the patterns reflected across the tales of the tags’ relationships to their targets
- Tale: The story of the tag’s meaning in relationship to the target in which you make the evidential qualities of the target in support of your tag overt
- Tag: The name you give to the target that reflects the meaning you ascribe to it
- Target: The portion of the text that has caught your interest
Strategies

- Question-Methodology-Report Connection
- Select Template
- Analysis Is Writing
- Write Early
- Re-Write Often
From Question to Report

- Research Question
- Method
- Data
- Coding and Memoing
- Analysis
- Findings
- Results
- Report
Differences

- View to Re-View
- Search to Re-Search
Analysis and Memoing

- Compose your analytical memos so they could be cut and pasted into the body of your report
- Name and explain/describe the qualitative difference in full sentences
- Copy and paste the data excerpt into the memo
- Explain or describe how the data excerpt exemplifies and evidences the meaning of your noted qualitative difference (e.g., code, category, theme)
- Bottom Line: Your analysis is your report!
Grounded Theory Data Analysis Map

- Theory (Theoretical Sensitivity)
- Interrelated Variables (Theoretical Coding)
- Themes (Axial to Theoretical Coding)
- Categories (Axial Coding)
- Sub-Categories (Axial Coding)
- Codes (Open Coding)
- Sub-Codes (Open Coding)

GT Map Example

5. Theory

Clients participating in conjoint marriage and family therapy perceived (a) Helpful and Unhelpful factors they attributed to their therapists (e.g., validating, confirming, supporting, non-judging, caring, transparent, facilitative, focusing, and expertise), (b) Helpful and Unhelpful factors they attribute to the therapy process (e.g., time to think, equal treatment, fair treatment, feeling comfortable, feeling safe, and non-blaming), (c) Helpful factors they attribute to themselves and their family members (e.g., gaining clarity, focusing on solutions, acceptance of issues outside of their control, self-agency, and choices made), and (d) Factors they attribute to therapy-life connections (e.g., homework assignments, improved relationships, reduced target behaviors, and change between sessions) as being critically important to their experiences of successful therapy. Different clients can perceive the same factors as being helpful or not helpful in determining their overall perception of therapy. Also, the conjoint aspect of their therapy experience seemed to result in clients being sensitive whether they perceived their treatment as being balanced and fair or not.
4. Interrelated Variables

Therapist <-- Therapy <-- Client and Family Members <-- Therapy-Life Connections

--------------------------------------Positive and Negative Factors-------------------------------------->

--------------------------------------Perception of Balance and Fairness in Therapy-------------------------------------->
3. Themes

- Positive and Negative Factors
- Fairness and Balance
2. Categories / Sub-Categories

- **Therapist Factors**
  - General Factors
  - Specific Factors
  - Unhelpful Factors
- **Therapy Factors**
  - Time and Place
  - Pivotal Moments
  - Unhelpful Moments
- **Therapy / Life Connections**
  - Process
  - Change
- **Client and Family Factors**
  - Changing the Viewing
  - Changing the Doing
  - Lack of Connection
1. Codes and Sub-Codes:

- **Category: Therapist Factors**
  - **General Factors**
    - Therapist style (e.g., calm, friendly, and understanding)
    - Celebrating their strengths
    - Fair and balanced
    - Nonjudgmental
    - Compliments
    - Good job of listening
    - Not trying to fix them
    - Not having an agenda for them
    - Asking questions
    - Working collaboratively
    - Respected their perceptions and experiences
    - Validated
    - Treated as experts on their own family experiences
    - Positive feedback
    - Coming up with new ideas about what to do
    - Not blamed
  - **Specific Factors**
    - Covert to Overt (e.g., Covert hopes for a miracle)
    - Reflecting Teams
    - Separating the person from the problem (e.g., externalization)
    - Psycho-educational sessions
    - Providing useful and up-to-date information in an easy-to-understand format
- **Unhelpful Factors**
  - Unequal treatment
  - Therapist talking when client wanted to talk
Data Presentation Strategies

- **Natural** - The data are presented in a shape that resembles the phenomenon being studied. For instance, if the data are excerpts from a therapy session, present them in a sequential order or in an order that re-presents the flow of the session itself.

- **Most Simple to Most Complex** - For sake of understanding, start the presentation of data with the simplest example you have found. As the complexity of each example or exemplar presented increases, the reader will have a better chance of following the presentation. Erving Goffman's work is a good example of this style.
Data Presentation Strategies

- **First Discovered/Constructed to Last Discovered / Constructed** - The data are presented in a chronicle-like fashion, showing the course of the researcher's personal journey in the study. This style is reminiscent of an archeological style of presentation: What was the first "relic" excavated, then the second and so forth.
Data Presentation Strategies

- **Quantitative-Informed** - In this scheme data are presented according to strategies commonly found in quantitative or statistical studies. Data are arranged along lines of central tendencies and ranges, clusters, and frequencies.
Data Presentation Strategies

- **Theory-Guided** - Data arrangement is governed by the researcher's theory or theories regarding the phenomenon being re-presented in the study. For instance, a Marxist-informed researcher might present data from a doctor-patient interview in terms of talk which shows who controls the means for producing information in the interaction, talk which illustrates who is being marginalized, and so forth. In clinical qualitative research, this approach is quite prevalent as clinicians organize the data in terms of their understandings of how doctor-patient, or nurse-patient, and therapist-client interact.
Data Presentation Strategies

- **Narrative Logic** - Data are arranged with an eye for storytelling. Researchers plot out the data in a fashion which allows them to transition from one exemplar to another just as narrators arrange details in order to best relate the particulars of the story.

- **Most Important to Least Important or From Major to Minor** - Like the journalistic style of the inverted pyramid, the most important "findings" are presented first and the minor "discoveries" come last.
Data Presentation Strategies

- **Dramatic Presentation** - This one is the opposite of the inverted pyramid style. With the dramatic arrangement scheme, researchers order their data presentation so as to save the surprises and unforeseen discoveries for last.

- **No Particular Order Order** - As it sounds, data are arranged with no particular, conscious pattern in mind, or the researcher fails to explain how or why the data are displayed the way they are.

Develop a Rhythm

- Section Heading
- Present the Distinction or Finding
- Introduce the First Data Exemplar of this Distinction
- Display the First Data Exemplar of this Distinction
- Comment Further on the First Data Exemplar of this Distinction
- Make Transition to Second Data Exemplar of this Distinction
Develop a Rhythm

- Display the Second Data Exemplar of this Distinction
- Comment Further on the Second Data Exemplar of this Distinction
- Make Transition to the Next Data Exemplar of this Distinction
- Repeat the Pattern until the Closing of this Section
- Next New Section Heading

Part III

Matching Research Purpose and Research Audience and Stakeholders with Representational Style
Research Purposes – 10C’s

- Curiosity
- Confirmation
- Comparison
- Critique
- Change
- Collaborate
- Combine
- Celebrate
- Create
- Competency
Audience and Stakeholders

- Co-Investigators
- Funding Source
- Editors
- Reviewers
- Readers
- Other Investigators
- Clinicians
- Policy Makers
- Lay
Representational Styles

- Scientific
- Artistic
- Basic, Applied, and Clinical
- Brief and Full Reports
- Mono- and Multi-Media
Know Your Writing Context

- Clinic and Lab Regulations and Guidelines
- Dissertation Guidelines
- Grant and Contract Reporting Guidelines
- Publisher Guidelines
- Journal Guidelines
Journals

- Editor and Editorial Board
- Editorial Mission or Vision
- Style
- Sections
- Primary and Secondary Audiences
- Papers Published
- Papers and Authors Cited in Your Own Paper
- Quality
- Rigor
- Special Calls
- Special Options
Part IV

Best Practices for Organizing and Composing Primary Care Qualitative Research Reports
Structure of a Qualitative Research Paper

- Title
- Abstract
- Introduction
- Literature Review
- Methodology
- Findings
- Discussion
Goal: Summarize the main idea of the paper simply and clearly

Three elements template: Variables/Issues, Relationships, and Methodology

Think database searches

Unpack-able

QR Tip: Be specific stating methodology
Abstract

• Goal: Present brief, concise content of the article

• Abstracts are not abstract

• Expansion of the title and abstraction of the paper
Abstract

- Five sentence template:
  - Problem
  - Participants
  - Methodology
  - Findings
  - Discussion

- QR Tip: State findings instead of writing about findings
Title-Abstract Relationship

- If something is mentioned in the title then it should also appear in the abstract!

- Expand the title to create the abstract
Introduction

- Goal: Introduce the problem and the research strategy
- Don’t start so far away
- Define your curiosity or problem
- Establish the significance
Introduction

- Develop the context
- Develop the gap
- Purpose and rationale

QR Tip: Introduce conditions under which qualitative research is well suited:
  - Naturalistic Inquiries, Discovery-Oriented Studies, Studying Phenomenon in Context, Studying Complexity, Favoring Insider Perspective
Review of Literature

- Goal: Present the relevant and critical body of knowledge
- Venn Way of Knowing
- Don’t forget the research
- “So therefore” –
- QR Tip: Make the connection between the known and the not known
Literature-Methodology Relationship

- Clearly state the logical relationship between the problem, the research, questions, and the selection of qualitative research in general and the selection of the methodology in particular for the study.
Methodology

- Goal: Describe in detail how the study was conducted

- Sections:
  - Methodology
  - Epistemology
  - Theoretical Perspective
  - Methodology
  - Method

- QR Tip: Be aware of Designer, Generic, and Knock-offs confusion

- QR Tip: Maintain Coherence within Methodology and with other elements in the paper
Methodology

- Sections

- Participants and Selection Strategy

- Method or Procedures
  - Data Generation
  - Data Collection
  - Data Preparation, and
  - Data Analysis

- QR Tip: Be Transparent: Make your choices known!
Methodology

- Sections
  - Quality Control
    - Trustworthiness
    - Rigor
    - Validity
  - Self and Preparation of the Researcher
    - Context
    - Connections
  - Ethics
- QR Tip: Protecting Confidentiality
Findings

- Goal: Summarize the results of your analytical processes
- Don’t make it hard to find the findings
- Data as star
Findings

• Don’t overstate or understate your data

• Develop a rhythm to the presentation of your findings

• QR Tip: Make connections to the literature in the Discussion section

• QR Tip: The artistry of hedging when reporting results
Discussion

- Goal: Evaluate and interpret your results
- Summarize your findings
- Connect your findings with the literature
- Limit your findings
- Don’t re-present your findings
Discussion

- Implicate your findings
- To generalize or not to generalize, that is the question
- Remember all of your stakeholders
- QR Tip: Use hedging language
- QR Tip: Avoid the QR Lament (i.e., I should have done a quantitative study!)
Part V

Appraising Published Primary Care Qualitative Research
Quality Checklists

• Positives
  • Growing consensus on quality
  • Making standards overt

• Negatives
  • “Cookie-cutter” approach
  • Lack of fit between checklists and different styles of qualitative research
Guide to Quality Checklists

Composing and Appraising Qualitative Research Reports: Collected Web Resources, Articles, Chapters, and Books

CASP Rubric

- Critical Appraisal Skills Programme’s (CASP) Making Sense of Evidence Tool: 10 Questions to Help You Make Sense of Qualitative Research

- Revised as Rubric

- 10 Elements, Individual CASP Element Evaluations with Supporting Evidence, Individual Element Scores, Overall Score, and Overall Evaluation of CASP Element Quality
Individual Element Evaluations

- Presence or Absence of Sub-Element
- Quality of Sub-Element with Supporting Source
- Evidence Extraction
- Location of Evidence
- Quantitative Score and Qualitative Appraisal
Element 1: Focus and Significance

- A clear statement of the research aims and goals
- Importance of the research
- Relevance
- Supporting citations
Element 2: Methodology Fit

- Appropriateness of qualitative research methodology in general to the research goals

- Fit between the selected qualitative research methodology and the research question(s)

- Supporting citations
Element 3: Research Design

- Research design

- Design’s appropriateness to address the aims of the research

- How, when, or why the design was selected

- Fit between design described and design implemented

- Supporting citations
Element 4: Sampling

- Sampling strategy
- Appropriateness to research aims and study’s design
- Process and outcomes of recruitment strategy
- Participants
  - How, where, when, and why the sites/participants were selected
  - Protected the identities of the participants
- Supporting citations
Element 5: Data Management

- Data generation, collection, and processing
- Data management responsibility
- Data fit
- Data justification
- Data management modifications
- Data saturation
- Supporting citations
Element 6: Self-of-the-Researcher

- Context of researcher
- Researcher training and expertise
- Relationship between researcher and participants
- Potential bias management
- Supporting citations
Element 7: Ethics

- Ethical issue consideration
- Implications of adverse or unexpected events
- Informed consent process
- Management and implications of informed consent or confidentiality issues
- Appropriate ethics committee review
- Supporting citations.
Element 8: Data Analysis

- Detailed description of data analysis procedures
- Sufficient rigorous data analysis process
- Fit with methodology and design
- Contradictory data management
- Quality control system
- Supporting citations.
Element 9: Findings

- Explicit and clear findings
- Coherent support of findings with sufficient data
- Evidence both for and against the researcher’s arguments
- Credibility of the findings
- Fit with methodology and method
- Fit with original research questions
Element 10: Discussion

- Research Value
- Limitations
- Contributions
- Compare / contrast findings to current practice or policy, or relevant research-based literature
- Areas of new research
- Generalizability / Transferability
- Supporting citations
Next Steps

- Conduct Article Autopsies
- Select Templates
- Develop Your Writing Habit
- Form Writing Support Group
- Seek Feedback
- Read
- Review
- Write, and Re-Write, and Re-Write
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