Busara Groundwork

LESSONS LEARNED

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Lessons from the field: what have we learnt from six years of doing qualitative research?

Busara

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Abbreviations and acronyms

AUDAS	Align, Understand, Design, Assess, Share
FGD	focus group discussion
IDI	in depth interviews
QAP	qualitative analysis plan

Table of contents

Figures

Introduction

For qualitative researchers, conducting field research involves more than just collecting data; it also entails meaningfully interacting with participants, communities, and environments—often in ways that alter the original goals of the study. This Groundwork attempts to close the gap between theory and practice by providing firsthand accounts of the difficulties of qualitative research. It also encourages qualitative researchers to adopt a more robust and adaptable methodology by sharing our lessons from years of qualitative research in the global south. For example, we shed light on how to design effective qualitative research studies, build rapport with participants, respond to erratic field circumstances, and navigate ambiguity while gathering deep, meaningful data from the participants. We hope these lessons will help better prepare you and/or your teams as they do field work so as not to repeat the same mistakes or to avoid learning from lessons they could have learned from us. We begin by explaining qualitative research and the approach that we follow to conduct qualitative research at Busara, a leading behavioral science firm headquartered in Nairobi, Kenya.

An introduction to qualitative research and our approach

Qualitative research focuses on gaining a deeper understanding of human experiences and relationships through in-depth exploration that does not rely on the manipulation of variables like is the case in quantitative research.1,2

1 Jackson II, R., Drummond, D., & Camara, S. (2007). What is qualitative research? *Qualitative Research Reports in Communication, 8, 21- 28*. https://doi.org/10.1080/17459430701617879
2 Gordon, W. (2010). Behavioral economics and qualitative research- a marriage made in heaven? *International Journal of Market Research, 53, 171- 18*. https://doi.org/10.2501/IJMR-53-2-171-186

As such, qualitative research involves collecting rich data and conducting in-depth analyses to see emerging patterns and themes without focusing on generalization of findings.3,4 This type of inquiry is mainly used when doing formative research in contexts where researchers know little about a phenomenon and/or in augmenting a quantitative approach.5,6 When qualitative research is used alongside quantitative research the approach is called mixed methods helps to augment the weaknesses of either method. For example, while a quantitative research approach might help us to know why participants view intervention A to be more effective than intervention B in driving the uptake of a desired product, qualitative research can be used to explore the reasons behind this perception and the elements of the intervention that the participants view as effective.

At Busara, we appreciate the value of both approaches and use them where we deem them most appropriate, with qualitative research primarily used in formative research to explore new contexts and phenomena. To do so, our projects follow the AUDAS research framework. The acronym AUDAS stands for: Align, Understand, Design, Assess, and Share. A detailed description of this framework has been published in our previous Groundwork Report, *The Busara toolkit: leveraging behavioral science for development.*7 In this Groundwork, we will share lessons along the AUDAS framework to showcase what a reader should know from the start to the end of a project lifecycle. (See more Busara studies here). The figure below describes the what and why of what happens in each of the phases of AUDAS:

3 Lune, H. & Berg, B. (2017). *Qualitative research methods for the social sciences (9th ed)*. UK: Pearson Education.
4 Jang, C., Koki, E., Nyaga, R., Okafor, A., Singh, J., Vang, A., & Wendel, S. (2024). The Busara toolkit: Leveraging behavioral science for development. Busara Groundwork (Research Agenda). Nairobi: Busara
5 Rubin, H. J., & Rubin, I. S. (2012). *Qualitative interviewing: The art of hearing data (3rd ed.)*. Thousand Oaks, CA: Sage.
6 Jang, C., Koki, E., Nyaga, R., Okafor, A., Singh, J., Vang, A., & Wendel, S. (2024). The Busara toolkit: Leveraging behavioral science for development. Busara Groundwork (Research Agenda). Nairobi: Busara
7 Jang, C., Koki, E., Nyaga, R., Okafor, A., Singh, J., Vang, A., & Wendel, S. (2024). The Busara toolkit: Leveraging behavioral science for development. Busara Groundwork (Research Agenda). Nairobi: Busara

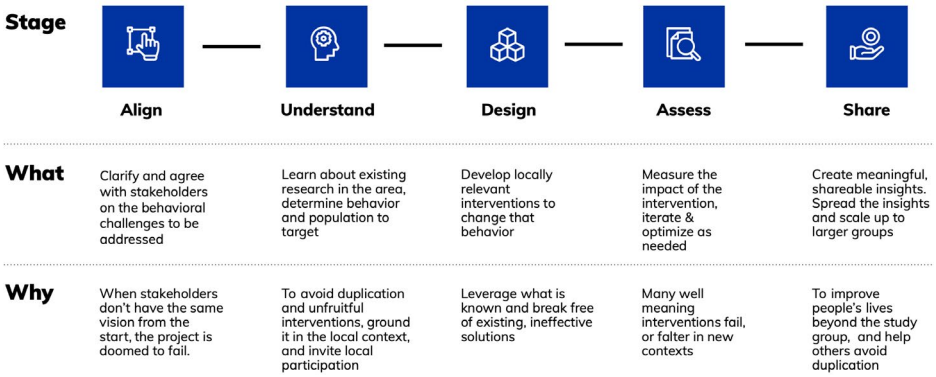

Figure 1: A quick summary of AUDAS (Source: Busara)8

8 Jang, C., Koki, E., Nyaga, R., Okafor, A., Singh, J., Vang, A., & Wendel, S.. (2024). The Busara Toolkit: Leveraging Behavioral Science for Development. Busara Groundwork (Research Agenda). Nairobi: Busara. DOI: doi.org/10.62372/WQSB6195

Lessons from the Alignment phase

In qualitative research, the **Align phase** is crucial for laying the foundation of the study. This phase ensures that all parties involved in the project understand the project's goals and methodology. These early conversations– with partners, project teams, and key stakeholders – are important in setting the standards for the team, clarifying expectations, explaining the value of qualitative methods to be used, and assigning roles and responsibilities for the team through the process.

From our experience, fostering a clear communication cadence and clarifying key aspects of the contract early on sets up the project for success. For example, when working with partners, aligning well with them helps to ensure that their expectations are met and enables us to stick to the project milestones, objectives, and budget.

In the long run, proper alignment helps the team to anticipate the challenges that the project might experience and create a risk management plan to mitigate these challenges. In a few of our projects based in fragile environments prone to violence and political instabilities in South Sudan, Ethiopia, and Burkina Faso, for instance, alignment helped us to work with partners to jointly identify how to engage members of the local communities targeted by the project, arrange security mechanisms for the field teams, as well as map out key stakeholders who have worked in similar environments and whose involvement can enhance the success of the project. To a large extent, having these plans early on helped us foster trust with the local community and partners, as they felt involved in a meaningful manner. Also, doing this exercise with the partners

prepares them for any adjustments that might be required on the project timelines to accommodate unforeseen circumstances. This differs from blindly rushing to execute on a project to beat the deadlines and issue the client with invoices. In volatile situations, at times, a simple thing, such as strategically delaying certain project activities, can help enhance the project's success. In an immunisation project that we are currently doing in South Sudan, we have had to delay certain activities to avoid the field activities happening at the same time as when the health ministry runs national immunisation campaigns as the same government officers we would need in our project would be engaged in other activities. These arrangements have worked well since we have worked closely with the client and the ministry of health. In hindsight, had we just decided to do these activities per the agreed -upon timelines, we would have failed, as some of these events were beyond our control and projections at the start of the project. Hence, flexibility and open communication lines with the project team, partners, and key stakeholders are crucial.

Busara uses tools like MOCHA and RACI to align and allocate roles and responsibilities.9,10 This helps to ensure that all team members are aware of their contributions and roles on each project and helps in avoiding confusion during the execution.

9 The Management Center. (2022). ***Clarifying responsibilities with MOCHA - The Management Center.*** https://www.managementcenter.org/resources/assigning-responsibilities/
10 Kantor, B., & CIO. (2024, June 7). ***The RACI matrix: Your blueprint for project success.*** CIO. https://www.cio.com/article/287088/project-management-how-to-design-a-successful-raci-project-plan.html

Lessons from the Understanding phase

After the align phase, the qualitative research work starts in the **Understand phase.** The following activities happen in this phase: design of qualitative tools, application for research authorization such as from the Institutional Review Board (IRB), crafting of the recruitment and sampling strategies, data collection, analysis, and synthesis of findings into a report. The figure below describes the activities that happen in this phase.

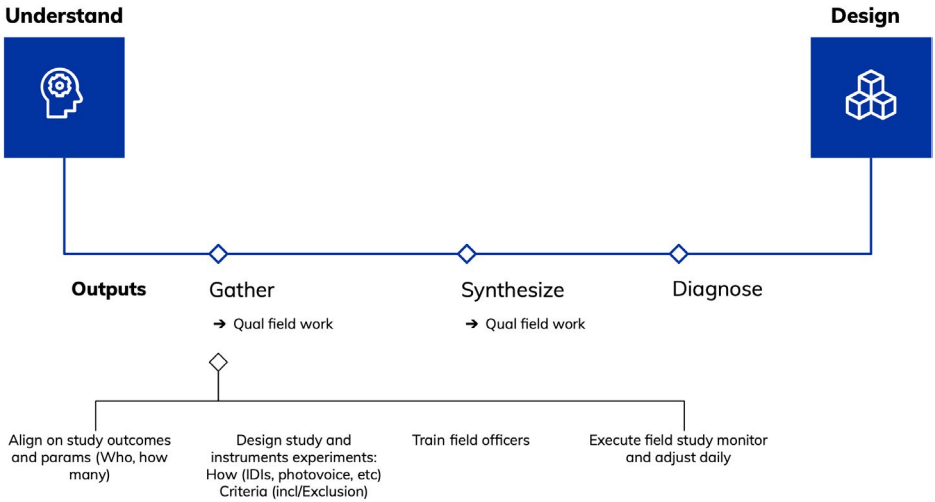

Figure 2: Detailed view of gathering data for qualitative fieldwork (Source: Busara)11

11 Jang, C., Koki, E., Nyaga, R., Okafor, A., Singh, J., Vang, A., & Wendel, S.. (2024). The Busara Toolkit: Leveraging Behavioral Science for Development. Busara Groundwork (Research Agenda). Nairobi: Busara. DOI: doi.org/10.62372/WQSB6195

The following lessons are crucial when doing fieldwork in this phase:

Understand the context in which the study happens

Qualitative research contributes immensely to formative research, incredibly where little to nothing is known about the context or phenomenon of study.12,13 However, to do meaningful research, we must aim to understand the context where the study will happen. This includes understanding details such as; the pressing needs in the community, cultural values, and beliefs of the participants that we hope to involve in the study. From our past studies, we have learnt that qualitative research has no universal lessons and each context is unique. Thus, it is important to approach each qualitative study with an open mind without blindly applying results from other contexts or expecting that challenges in the new study will be similar to those previously experienced.

Focus on the well-being of the community and its members

One of the most critical lessons that we have learnt in our research studies is the importance of putting the target communities at the center of our research. This goes beyond mere permissions to gain access to the community and the consent of participants. For us, purposive community engagement focuses on treating the participants as co-creators of

12 Rubin, H. J., & Rubin, I. S. (2012). *Qualitative interviewing: The art of hearing data* (3rd ed.). Thousand Oaks, CA: Sage.
13 Jang, C., Koki, E., Nyaga, R., Okafor, A., Singh, J., Vang, A., & Wendel, S. (2024). The Busara toolkit: Leveraging behavioral science for development. Busara Groundwork (Research Agenda). Nairobi: Busara

knowledge. Thus, as you do research, it is essential to ask yourself how the community benefits from your research or even how you will share the results from the study with them. This helps foster trust with the community members as it changes the dynamics of the relationship between the researcher and the community from a transactional stance to a more participatory one that treats participants as co-equals. We will discuss ways of sharing the findings with the community in the share phase of AUDAS toward the end of this piece.

In one study that we did in Kenya on how participants would like to be involved in research, a majority of the participants, for instance, said that they would like to be treated with dignity in research as their participation in the research studies helps the researcher to interact with and know the participants more, and informs decisions in policy making. Also, the participants reported that they are representatives of their communities and that whenever they participate in research studies they do so as the community's voice. Below are some of the comments that the participants made:

> *"When I participate in a research study, I act as my community's spokesman so I say things as I see them in my community"* **- Male, 48 Years Old, Kawangware, Nairobi**

> *"It is important to me [to hear the study's findings] to know what happened and what will happen now. I would like to know what the results were and how it would help someone"* **- Female, 28 Years Old, Kibera, Nairobi**

The above comments highlight the importance of meaningfully involving community members in research studies. A researcher can enhance community involvement in research through the following ways:

a. **Using participatory action research methods:** Participatory action research methods such as photovoice, power walk, and photo elicitation are particularly important when researching sensitive topics or working with vulnerable groups of participants as they empower the participants throughout the research process.

b. **Involving the community members in data collection.** This might entail engaging field officers from the community to collect data rather than outsiders, and ensuring they receive fair pay for the work done. In the long run, involving field officers from the community helps uphold the community's cultural and religious beliefs.

c. **Ensure your research is inclusive:** Your participants have different constraints. Before the study, ensure that the participants have a fair warning of what they will be required to do, how long the activities will take, any benefits that might accrue to them or their communities, or even the risks involved. If you have lactating mothers, allow them time to make arrangements for childcare, etc.

d. **When researching volatile areas, build trust with the government and leverage the community gatekeepers and other partners.** In one project we ran in Ethiopia, the government and the client had made previous efforts to improve maternal and child health so we did not have to start our project from scratch. Through keen consideration of the research findings and intentional adaptations of key learnings to suit the contexts, we were could also borrow lessons from our other successful projects in other countries. For example, we did a similar maternal health project in India where a calendar effectively tracked antenatal clinic visits and adherence to iron folic acid (IFAs) pills. Still, in another example of community participation, in South Sudan we are utilizing government representatives and community members as

actual field teams in data collection and community entry and Busara staff as facilitators mostly handling project management aspects. This project started by training these teams on the nature of the study, how to gain access to the community, how to collect and interpret data, and ways of reporting this data to other stakeholders involved in the project. So far, we have registered success on the project as the community members trust the South Sudanese field teams and do not see us as outsiders, but as co-creators with them on the project.

Choose an appropriate research design

Qualitative research is exploratory and is most suited for topics requiring in-depth exploration, especially where less is known about the context.[14] The choice of research design is guided by methods and strategies for inquiry (e.g. ethnography, narrative, phenomenology, etc) that the study uses.[15] Choosing an appropriate design helps anchor the study by ensuring that the assumptions and strategies for inquiry align with extant research. Regardless of the approach you employ, the steps to prepare for qualitative research remain fairly similar:

a. **Choose methods fit for purpose:** Qualitative research offers a rich array of methods, and each project requires careful consideration of which approach best addresses its unique goals. While in-depth interviews (IDIs) and focus group discussions (FGDs) are popular, alternative methods such as photovoice or story completion can add depth and diversity to your data. For vulnerable populations, participatory action

14 Creswell, J. W. (2009). *Research design: Qualitative, quantitative, and mixed methods approaches* (3rd ed.). Thousands Oak: Sage Publications, Inc.
15 Creswell, J. W. (2009). *Research design: Qualitative, quantitative, and mixed methods approaches* (3rd ed.). Thousands Oak: Sage Publications, Inc.

research (PAR) is particularly effective, as it involves participants actively in the research process.16 The choice of method should be guided by the study's objectives, population characteristics, and willingness to explore innovative techniques. In one sex and reproductive health study, for example, we realized that young women had difficulty sharing their experiences on their usage of family planning as sex related topics are stigmatized in their communities. However, when we used vignettes in the interviews describing scenarios girls in their communities are likely to experience when accessing family planning, the participants quickly disclosed their experiences without feeling ashamed. In another study aimed at understanding the barriers and facilitators of open defecation in a refugee camp in northern Kenya, we used photovoice focus group discussions. We conducted a transect walk with the participants. These methods empowered the participants to disclose their views about open defecation and observe its impacts in their environs without feeling judged in ways that traditional methods, such as in-depth interviews and focus group discussions, would not. Therefore, before collecting data, ensure the proposed methods are appropriate for the study. You can read more about ways of conducting rigorous qualitative research in this Groundwork.17

b. **Create a qualitative research analysis plan whenever possible:** After choosing your study design and aligning it with the research objectives and goals of the project, it is advisable to create a qualitative analysis plan (QAP). QAP helps enhance the study's replicability by explaining the steps followed in recruitment, sampling, data collection, and

16 Baum, F., MacDougall, C., & Smith, D. (2006). Participatory action research. *Journal of Epidemiology and Community Health, 60*(10): 854-7. doi: 10.1136/jech.2004.028662
17 Nyaga, R.G. & Wendel, S. What is rigorous in-depth qualitative research in behavioral science? Busara Groundwork No. 11 (Thought Piece). Nairobi: Busara, 2024. doi.org/10.62372/LDGW4731
18 Moravcsik, A. (2019). Transparency in qualitative research. Sage Research Methods: London. http://dx.doi.org/10.4135/9781526421036

analysis.18 While it is common sometimes to do qualitative research without a QAP, we see value in having it as it enhances transparency and contributes to the growth of a community of practice by ensuring other people interested in doing similar studies can follow a similar process.19 Here is an example of a QAP template.20

Develop robust data collection instruments

Developing robust qualitative instruments is important in ensuring high-quality research findings. This is because qualitative data is as good as the questions asked during data collection. Thus, a robust instrument does more than just gather data, it aligns with research questions, and considers innovative ways of engaging the participants. Here are some best practices for developing qualitative instruments, enriched with examples from our experience with qualitative research.

a. **Anchor instruments on a theoretical framework or model:** The design of your instrument should begin with clarity about the behavior being explored and the intended structure of the output. Using a theoretical framework or model as a foundation can help shape your data collection tools and inform the most effective way of analyzing data. For example, if studying vaccine uptake, select frameworks that reflect relevant behaviors and contextual factors you want to evaluate. In Nigeria, we implemented a project to explore factors influencing the uptake of vaccines among Nigerian communities. The project intended to use the Social Ecological Model (SEM) to map the factors

19 Nyaga, R.G. & Wendel, S. What is rigorous in-depth qualitative research in behavioral science? Busara Groundwork No. 11 (Thought Piece). Nairobi: Busara, 2024. doi.org/10.62372/LDGW4731
20 The qualitative analysis plan is adapted from Bengtsson, M. (2016). How to plan and perform a qualitative study using content analysis. ***Nursing Plus Open, 2***, 8-14. https://doi.org/10.1016/j.npls.2016.01.001

influencing vaccine uptake. However, the data collection tools and initial project report that had been developed were not in line with the framework. The project team had to take a step back and think through an alternative way of redefining the outputs to incorporate the Advocacy, Communication, and Social Mobilization (ACSM) framework developed by Nigeria's National Primary Health Care Development Agency, which was deemed to be the most suitable. There are free online resources that can help you choose the best theory for your project. For example, if doing a health-focused project, you can use a theory picker tool developed by the Centers for Disease Control and Prevention.21 Basing the questions of an instrument on a theoretical framework and/or model ensures that the questions asked are guided by relevant literature and helps the researcher(s) to analyze the data collected on the project effectively.

b. **Behavior maps are important in visualizing the barriers and levers of the desired behavior:** A behavioral map visually breaks down the steps that lead to the desired behavior in a clear manner that helps showcase the barriers and levers at each step.22,23 Using behavioral mapping also makes designing interventions to help the target population overcome the identified barriers easy. You can read more on how to create behavior maps in our toolkit.24

21 Centers for Disease Control and Prevention (n.d). *TheoryPicker - Picker*. https://www.orau.gov/hsc/theorypicker/picker.html
22 Ng, C. F. (2016). Behavioral mapping and tracing. In R. Gifford (Ed.), *Research methods for environmental psychology* (pp. 29–52). Wiley.
23 Jang, C., Koki, E., Nyaga, R., Okafor, A., Singh, J., Vang, A., & Wendel, S. (2024). The Busara toolkit: Leveraging behavioral science for development. Busara Groundwork (Research Agenda). Nairobi: Busara
24 Jang, C., Koki, E., Nyaga, R., Okafor, A., Singh, J., Vang, A., & Wendel, S. (2024). The Busara toolkit: Leveraging behavioral science for development. Busara Groundwork (Research Agenda). Nairobi: Busara

c. **Align the questions with research objectives:** A well-designed instrument directly addresses the key research questions without overburdening the interviewer or respondent. Start by breaking down the research objectives into broader questions, then build in targeted probes to explore each theme. Avoid creating overly detailed guides that leave little room for organic exploration. Long instruments can lead to interviewer rigidity, respondent fatigue, and a loss of narrative richness. A concise, well-thought-out guide empowers interviewers to adapt and probe effectively, allowing respondents to share their stories in their own words.

d. **Pilot your instruments for validity and consistency:** No matter how thorough the initial design. Testing it with a small sample allows you to refine questions, identify ambiguities, and ensure alignment with research objectives. Piloting also helps uncover logistical challenges, such as timing or question flow, and ensures the instrument is grounded in validated frameworks.

e. **Invest in training the field teams:** A great instrument is only as effective as the team implementing it. Thorough interviewers and research assistants' training ensures data collection consistency, accuracy, and quality. Training sessions should cover:

i. **Research objectives:** Equip teams with a clear understanding of the study's goals and protocols.
ii. **Consistency in questioning:** Emphasize the importance of asking questions uniformly to reduce variability.
iii. **Probing skills:** Train interviewers to ask follow-up questions, clarify ambiguities, and delve deeper into responses.
iv. **Cultural sensitivity:** Encourage awareness of non-verbal cues, cultural nuances, and participant comfort to gather richer insights.

Skilled interviewers collect high-quality data and document detailed notes and reflections, which can reveal emerging themes early in the process, streamlining analysis.

There is value in doing field visits for data analysis and reporting

The team conducting field work holds significant value in qualitative research data analysis and reporting stages. While it is common for different stages of the qualitative study to be segmented and handled by various team members, where you have one person collecting the data, and the other writing the final report, the separation can sometimes hinder the depth and coherence of the insights generated.

Our experience has shown that having the person responsible for the final analysis and report writing have direct involvement in the earlier stages of the research process, such as contributions to the instrument design, and where possible, involvement in data collection activities. Having earlier involvement builds a deeper understanding of the context of the study and nuances of the data collected, which are often critical for drawing meaningful insights. The involvement in data collection also helps the researcher observe the respondents' non-verbal cues and connect the realities of the participants by uncovering unspoken dynamics as these elements may not be fully captured in the transcripts.

Whilst transcripts show you what was said, they miss out on the context in which that conversation happened, body language, and the environment

Even if it is being conducted in another language, the researcher should be in the field for at least a day or two to see what is happening on the ground and pick up on any challenges being faced. The pilot can be a

significant phase to do this in. We had a project in Rwanda looking at encouraging uptake of a financial product by a popular mobile provider. When we asked participants what provider they used, they listed out the provider we were researching. However, we noticed that most respondents had more than one phone. When we questioned them about it, they said they used different providers for different things, and avoided using our one for data as they were expensive. Without that insight, we would have believed they had a high market penetration and could easily take up the product. This showed us that we first needed to address some of the perceptions around costs and potentially incentivize them to use their phone providers differently to encourage product uptake.

Similarly, when piloting a qualitative survey on the use of an HIV prevention product in five different countries, we learnt various things that helped inform our strategy/ change the instrument design - these would not have been things passed onto us by the Field officers, we had to be there to see or hear it. For example, during the training in Zimbabwe, we overheard some field officers talking about a ritual. When we questioned them on it they mentioned it was a coming-of-age practice that young women underwent called Kusasa fumbi where they are educated on sexual roles and responsibilities within marriage, which could impact their perceptions on HIV prevention. We included it in our survey and it was one of the factors that was significantly correlated to uptake of the HIV prevention product.

Lessons for Designing interventions

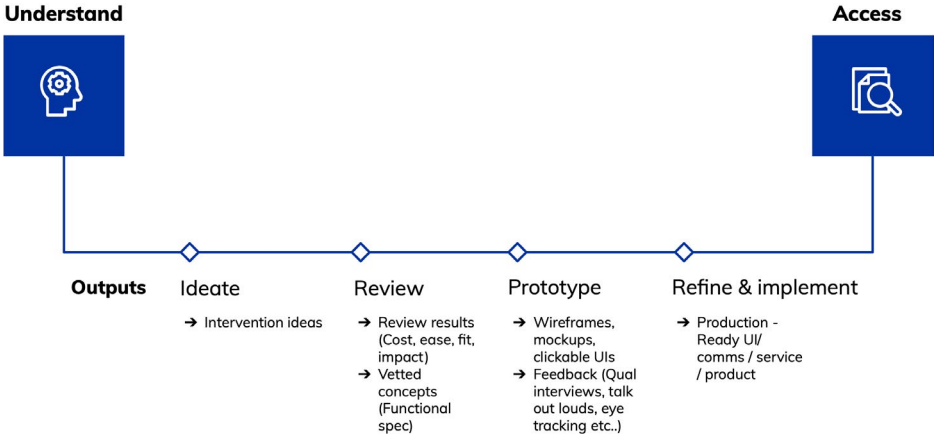

Figure 3: An overview of the steps of design synthesis from ideation to refinement/ implementation (Source: Busara)25

The **Design phase** is the stage where insights from qualitative research are converted into actionable and evidence-based interventions to power the desired behavior change. At Busara, we use the findings and lessons from the understanding phase to design interventions. Although this phase relies heavily on design research, there are many ways in which qualitative research contributes to the successful design of interventions. Busara

25 Jang, C., Koki, E., Nyaga, R., Okafor, A., Singh, J., Vang, A., & Wendel, S.. (2024). The Busara Toolkit: Leveraging Behavioral Science for Development. Busara Groundwork (Research Agenda). Nairobi: Busara. DOI: doi.org/10.62372/WQSB6195

approaches the design stage in **four** phases: **ideate, review, prototype and refine.26** Below are some of our lessons for the design phase:

a. **Bring designers on board early on:** For the design phase to run successfully, one of our key lessons is that the design team should work closely with the qualitative research team to ensure that the findings from the understanding phase are interpreted effectively as they lay the foundation for designing interventions. Whenever possible, it is advisable to have designers be exposed to the entire spectrum of project activities early on so they can understand the scope and breadth of the workstreams and avoid misunderstandings. This will also help the designers build a familiar base with the research process and the audience's context, which allows them to ask relevant and informed questions and make more relevant design decisions. From experience, when designers are brought on board late or just let to rely on qualitative findings done by other teams without a proper overlap, there tends to be lapses in the process and the interventions designed often lack connection to the previous phase. By involving the designers from the start, the team creates a stronger synergy, where qualitative and design expertise complement each other to produce innovative and evidence-based interventions.

b. **The design phase relies heavily on qualitative research and the success of design work relies heavily on skillset of the design team:** May it be in facilitating the co-design workshops, ideating with the target audience, or winnowing down the suggested ideas, a designer turns to qualitative research skills to make the process a success. These skills include observing, probing, and listening listen actively, which are

26 Nyaga, R.G. & Wendel, S. What is rigorous in-depth qualitative research in behavioral science? Busara Groundwork No. 11 (Thought Piece). Nairobi: Busara, 2024. doi.org/10.62372/LDGW4731

essential skills used for uncovering meaningful insights during design sprints. For example, the designer might want to do a quick version of a focus group discussion to understand how the group perceives the topic and to whittle down the ideas. Additionally, analyzing qualitative inputs is crucial in helping designers quickly get insights from the design sprints. This makes sure that the design process is both dynamic and participant-centered.

c. **Interventions for remote/hard to reach areas should be low tech and easy:** Working in countries where we do not speak the language can lead to a loss of deep insights. In Burkina Faso, we worked at three levels of language: communication on the ground was in Mooré, transcripts were then translated to French, and then to English for analysis and report writing. Throughout all the translation rounds, we missed critical cultural nuances. Thus, communication content needs to be low tech and highly visual to be feasible and impactful - even simple words are difficult to include since the local languages spoken have no written form. For example, using illustrated guides, pictorial charts or interactive model can help convey key messages in areas where literacy or language barriers might pose a challenge.

Lessons from the Assessment phase

The **Assessment or the testing phase** is where interventions are tested before scaling as shown in the figure below.

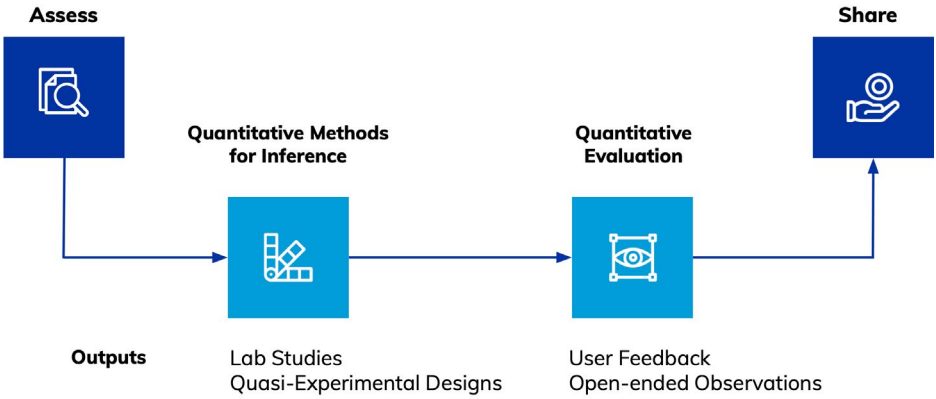

Figure 4: Description of the process of testing and sharing interventions (Source: Busara)27

While most of our projects rely extensively on quantitative approaches to testing the effects of designed interventions, qualitative research offers some benefits to provide a more holistic review of our solutions. Such benefits include:

- **Assess perceptions related to the designed prototypes and interventions:** Interviews and focus group discussions provide valuable

27 Jang, C., Koki, E., Nyaga, R., Okafor, A., Singh, J., Vang, A., & Wendel, S.. (2024). The Busara Toolkit: Leveraging Behavioral Science for Development. Busara Groundwork (Research Agenda). Nairobi: Busara. DOI: doi.org/10.62372/WQSB6195

opportunities to assess initial perceptions of the target populations of the proposed intervention, i.e., the structure of incorporated key messages, potential improvements to designs to enhance comprehension, etc.

- **Generate user insights on the testing process:** To enhance the effectiveness of lab sessions aimed at testing prototypes in future iterations.
- **Assess potential behavioral or attitudinal changes associated with the interventions:** When used alongside quantitative testing methods, interviews and discussions can also be leveraged to explore the possible shifts in behaviors or attitudes attributed to the developed solutions, i.e., to explain the potential effects of the interventions.

Here are some lessons on leveraging qualitative research methods during the assessment phase:

a. **Be intentional about the structure of the data collection guides:** When creating the data collection guides, be clear about the research goals and questions. Are you interested in assessing the conditions of the lab session? Are you focused on understanding how the prototypes influence the target populations' behaviors, or are you curious to understand their thoughts on the designs? Like we said before, a well-designed instrument directly addresses these key research questions. To ensure the validity of your tool, you may want to consider basing its development on a BeSci framework, such as the COM B model.

a. **Garbage-in-garbage-out; Quality-in-quality-out:** The quality of the data your tool will generate is mainly dependent on the ability of your data collection team. Ensure that members of this team are extensively trained on the goal of the data collection activity, key underlying research questions, and how best to administer the tool.

The most optimal training sessions incorporate role-playing elements, allowing field team members to learn practical skills to enhance their engagement with study participants, including tackling issues with pacing/timing, unresponsive participants and problematic questions.

a. **Pilot your developed data collection guide:** Conduct a few interviews or group discussions using your developed tool with prospective study participants ahead of the main data collection. This will allow you to:

ii. Develop possible preliminary hypotheses to be explored during the main data collection for the assessment phase

iii. Thoroughly check your analysis procedures

iv. Identify problematic areas in your tool/guide, i.e., errors, questions that may confuse participants, etc.

v. Test the effectiveness of your field team in administering the data collection tools

Lessons from the Share phase

The **Share phase** is the last phase of the AUDAS process. Sharing the research findings concludes research work process and how you package the research findings could impact how the target audience receives the findings. The figure below shows some of the activities that happen in this phase.

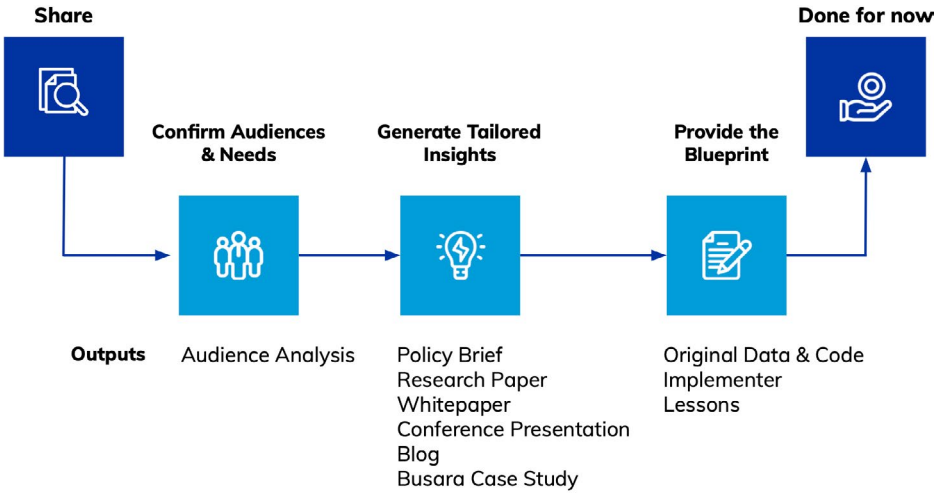

Figure 5: An overview of the Share phase (Source: Busara)28

28 Jang, C., Koki, E., Nyaga, R., Okafor, A., Singh, J., Vang, A., & Wendel, S.. (2024). The Busara Toolkit: Leveraging Behavioral Science for Development. Busara Groundwork (Research Agenda). Nairobi: Busara. DOI: doi.org/10.62372/WQSB6195

Below are some lessons for the share phase:

a. **Always have your audience in mind:** Before writing a report or preparing a presentation, it is important to identify the audience, e.g., is the audience a technical person, a sector expert or a general audience? This step is critical in informing how to structure the findings and insights for the target audience. For example, consider a project focused on assessing the factors affecting the uptake of primary health services in Nigeria. How you develop your report and package your insights would depend largely on what audience you will be sharing these with. Typically:

- **Representatives from the Ministry of Health** and **implementing organizations** may be interested in understanding the methodology your team applied to generate your insights, co-designing the interventions and a more in-depth review of how these were tested and what observed behavioral changes you noted that may be attributable to those interventions.
- Conversely, the **funders** may be more interested in a high-level overview of the key activities undertaken throughout the project's life cycle, underlying behavioral science mechanisms or biases, timelines/ milestones, and the assessment phase results.

There are five (5) types of audiences you should plan for:

- **Novices:** This is their first exposure to the topic but they do not need overly simplified information.
- **Generalists:** These people are aware of the topic but are looking for a general overview of the project and the major themes relevant to the findings.
- **Managers:** This audience has a greater demand for an in-depth and detailed understanding of the findings.

- **Experts:** This audience is well-versed in the subject area and is more interested in new areas of exploration and the uncovering of new insights.
- **Executives:** This audience would typically only focus on the significant findings and actionable recommendations, and may be less interested in the "fluff".

b. **Choose the right delivery method to communicate your findings:** once you know your audience, choose the most appropriate channel under the circumstances. This is heavily influenced by the expectations of the funders and partners, as well as the informational needs of other stakeholders. To help, you should be able to answer the following questions:

- **What is the nature of the report?** Findings may be presented as a word report, a presentation, a thought piece, a video, or a blog article.
- **How will the findings be shared?** This may be through a one-day dissemination event with implementers, a virtual meeting with the funders and partners or a validation workshop with representatives from the community. Typically, blogs, articles, and publications are vital channels for reaching a wider audience, including beneficiaries, and sharing key lessons with implementers in the space who are connected to us.

c. **Create a draft outline:** The first step when developing the report or literature piece is to decide on the appropriate outline for the report and ensure that the team is aligned on the purpose of each section in the proposed outline. This outline is the backbone of the report.

d. **Let the participants' voices be seen in reports:** When drafting the reports, emphasis should be on the participants' words. Include as many golden quotes as possible. This helps to provide more nuance

and explanations behind the themes we see. When adding the quotes, ensure that the anonymity of the participants is maintained and avoid providing too many demographic details in the description of the quotes. As qualitative research is heavily context-driven, including participants' quotes helps the reader to understand the broader context of what the participants meant when they shared their experiences with the researcher.

e. **Leave enough time for sufficient review:** Ensure you have enough lead time from the due date of the dissemination to allow your team to collect and act on feedback to improve the report. Your internal team is the first port of call when seeking feedback to develop the report collaboratively. Following this first round of internal review, you may then invite the external team (funders and partners) to share their own feedback.

It is important that you agree on timelines with the internal and external reviewers to allow them enough time to properly interrogate the draft report and to give yourself enough time to make the revisions.

Please note: If needed, you can liaise with the Voice and Impact teams to support you with promoting the dissemination event and/or aesthetically fine-tuning/redesigning the report.

Conclusion

Doing qualitative research correctly is important mainly due to its great value in international development. However, qualitative research can be daunting and complex. Nevertheless, we can more effectively navigate these complexities by learning from the experiences and challenges of others in the field. We hope that our approach of sharing our lessons across five essential workstreams—Align, Understand, Design, Assess, and Share, clarifies effective ways of approaching qualitative research. Although your organization's approach to doing research might vary from ours, we believe that these lessons will still come in handy in helping you to do your fieldwork with intentionality, avoid common pitfalls, and collect rich data that helps you to address the objectives and/or research questions of your study. Additionally, doing qualitative research the right way can help us better serve the communities we work with by ensuring we align well with key stakeholders, understand the context where we work, use the proper methods, and generally, do qualitative research effectively. As we are a learning organization, we would appreciate your feedback on this groundwork and hearing your approach to qualitative research.

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Busara Groundwork
LESSONS LEARNED

About Busara

Busara is a research and advisory organization, working with researchers and organizations to advance and apply behavioral science in pursuit of poverty alleviation. Busara pursues a future where global human development activities respond to people's lived experience; value knowledge generated in the context it is applied; and promote culturally appropriate and inclusive practices. To accomplish this, we practice and promote behavioral science in ways that center and value the perspectives of respondents; expand the practice of research where it is applied; and build networks, processes, and tools that increase the competence of practitioners and researchers.

About Busara Groundwork

Busara Groundwork lays the groundwork for future research and program design. As think pieces, they examine the current state of knowledge and what is needed to advance it, frame important issues with a behavioral perspective, or put forward background information on a specific context.

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