



# Quirkos

Dr Cathy Gibbons

[cathy@quirkos.com](mailto:cathy@quirkos.com)

**TQR 14TH ANNUAL  
CONFERENCE**

February 16-18, 2023

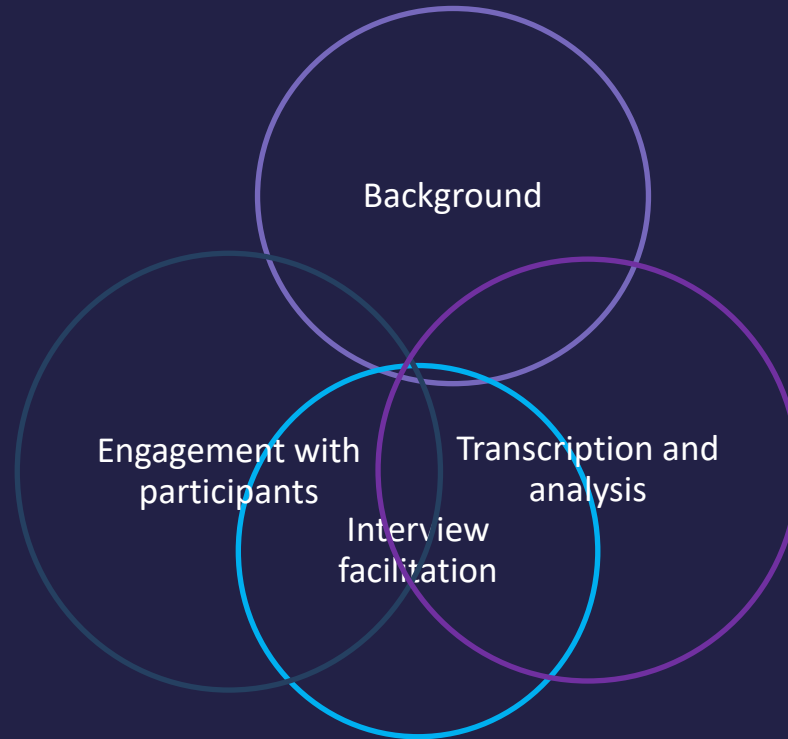
*Workshop: Opening the Black-Box of the  
Quirkos Qualitative Researcher Journeys Project*

# Workshop outcomes

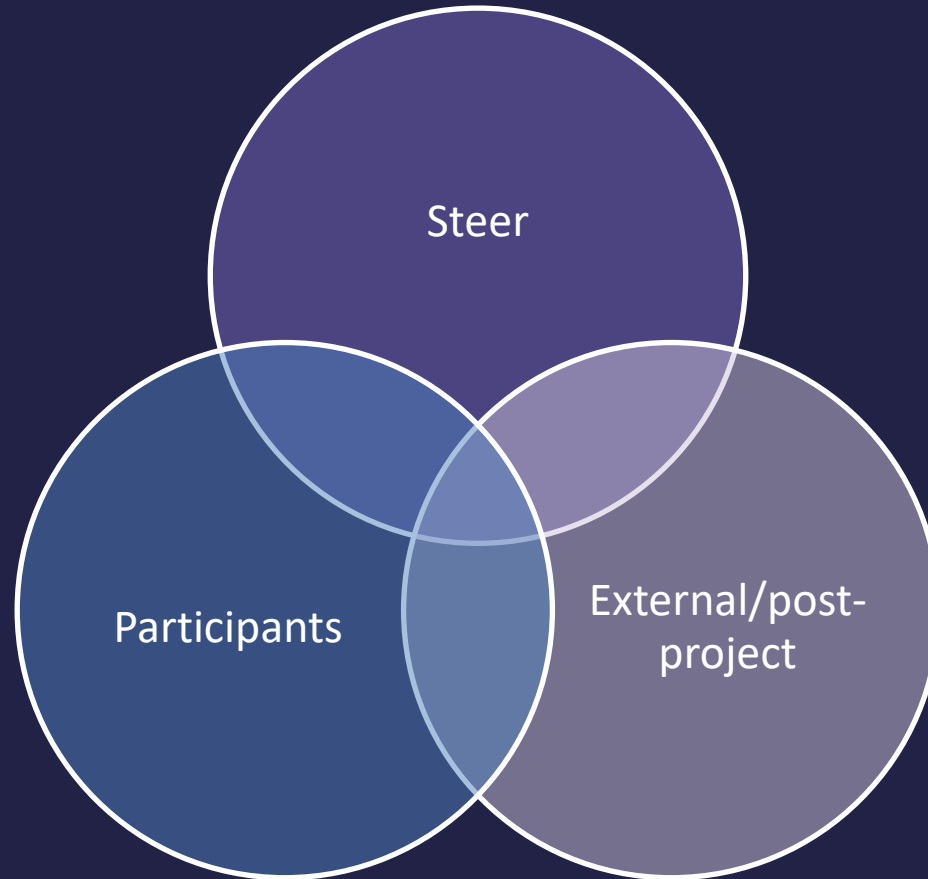
- Improved understanding of;
  1. What project documentation needs to cover for ethical purposes
  2. How project proforma can be used to support data gathering and analysis processes
  3. Some of the problems and limitations of real project documentation
  4. What might be considered as minimally essential for good practice, as compared with helpful, practical, maximally possible, or un-necessarily burdensome

Phase of research (material type)	Example documentation
<b>Background</b> (Design and approval)	Call for participants
	<b>Project information</b>
	<b>Protocol, ethics statement and risk assessment</b>
<b>Engagement with participants</b> (Advertising, recruitment and correspondence)	Possible email text to recruit
	Possible email response to interest
	Participant record example
	<b>Consent form</b>
<b>Interview facilitation</b> (Data gathering aide-memoire and pro-forma)	Actions aide-memoire
	<b>Trial question set</b> with reflexive answers
	Interview summaries or field notes
<b>Transcription and analysis</b> (Data handling and analysis summaries)	Transcription protocol
	Transcripts
	Transcript summaries
	<b>Transcript return form</b>

# Research documents – purpose

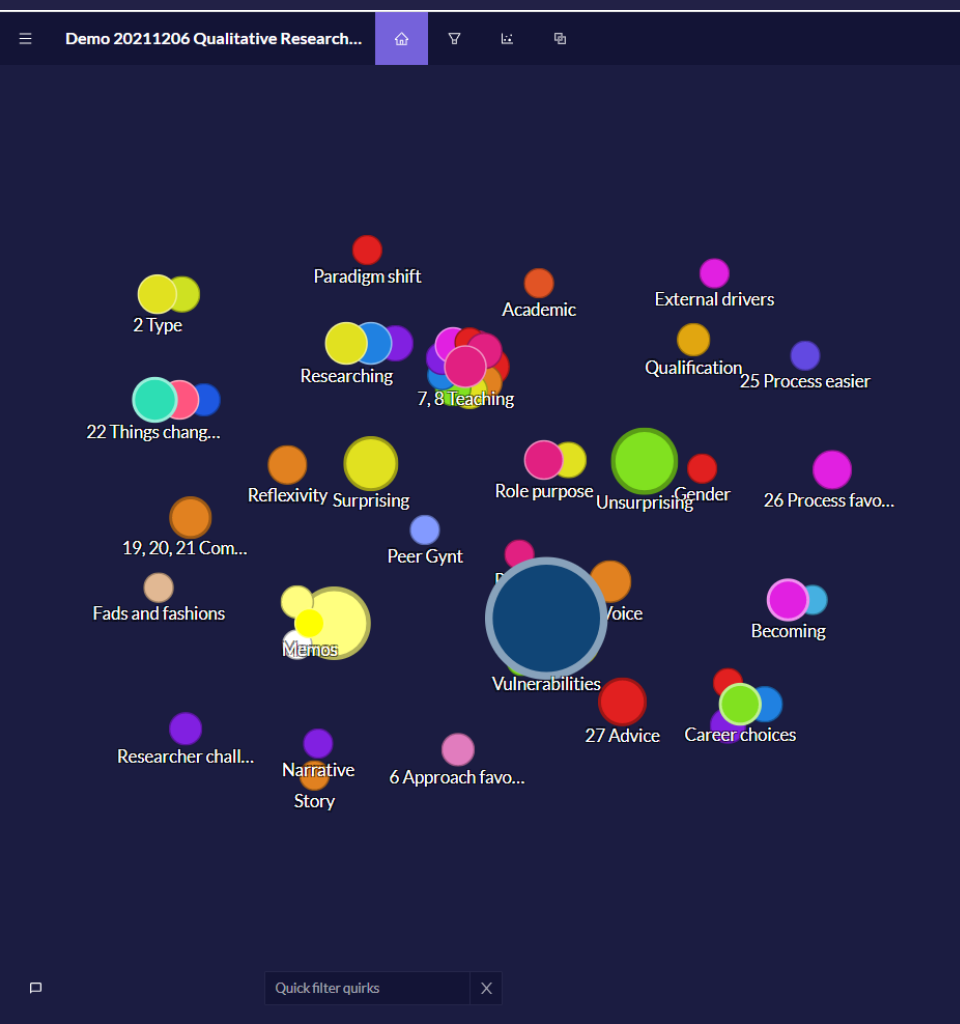


# Research audience – who gets to see what



# Quirkos' *Qualitative Researcher Journeys* project documentation

Phase of research (material type)	Often found in Appendices	Rarely seen after the end of project
<b>Background</b> (Design and approval)	<b>Project information            Protocol, ethics statement            and risk assessment</b>	<ul style="list-style-type: none"> <li>• <i>The need for the research or proposal</i></li> <li>• <i>Outlining the documents needed for managing the project</i></li> <li>• Call for participants</li> </ul>
<b>Engagement with participants</b> (Advertising, recruitment and correspondence)	<b>Consent form</b>	<ul style="list-style-type: none"> <li>• Possible email text to recruit</li> <li>• Possible email response to interest</li> <li>• Participant record example</li> </ul>
<b>Interview facilitation</b> (Data gathering aide-memoire and pro-forma)	<b>Trial question set</b>	<ul style="list-style-type: none"> <li>• Actions aide-memoire</li> <li>• Trial question set with reflexive answers</li> <li>• Interview summaries or field notes</li> </ul>
<b>Transcription and analysis</b> (Data handling and analysis summaries)	<b>Transcript return form</b>	<ul style="list-style-type: none"> <li>• Transcription protocol</li> <li>• Transcripts</li> <li>• Transcript summaries</li> </ul>



Roger Health

what they learnt to do. And obviously, sometimes, you know, well, it's really, really important. But I'm finding myself saying, there are times when it might be just better to sit back and think about it for a minute.

So, I think that's probably the root of it. Whereas, you know, if you're trained as some kind of social scientist, you are trained to think, and to reflect, and to consider theoretical concepts and that kind of thing. It kind of goes with the territory. So, I think that's the, you know- it's not a bad thing per se. It's just it can sometimes make- well, interdisciplinary research a bit more tricky.

[00:39:57]

INT: Yes. So, I'm going to kind of, take you back to, kind of, back over your whole career now, and that sense of, what things do you think have changed most since you first started researching?

[00:40:16]

RES: So, it's- fortunately for me, it's much easier to get social scientific, qualitative research funded by the- particularly for National Institute for Health research, but also the kind of, health research charities. They're much more relaxed. Particularly if it's part of a kind of, a larger or wider study. So, that's been good for me, and for other people who kind of do what I do. I think concomitantly, it's probably harder to get money out of the research councils. ESRC in my case, but my guess is that my scientist colleagues will probably say something similar.

I'm not sure that, you know, there's been kind of gigantic methodological advances. You know, it's hard to see what's kind of.

[00:41:21]

INT: Ooh, can I just check. I was kind of nodding along with an assumption then, and I realised that I need to ask you, with the medical research councils, and getting money seems to be a little easier. Why do you think that is?

[00:41:35]

RES: Well, I think that they have- that what probably drives that is, it's now kind of more widely understood why kind of, translation implementation is such a problem and that the, you know, the medical school library has got shelves and shelves of papers that report randomised controlled trials of treatments that work. Why is it so difficult to get the NHS to use them? It's not particularly an NHS problem because it's the same in every country in the world. So, I think the- particularly the National Institute for Health research have kind of realised that those questions are important, and they're not amenable to science. They're principally social questions that require social scientific answers and approaches. So, I think that's been kind of good news for us as social scientists and that we're kind of- I think we're becoming a bit like the statisticians and health economists that we're kind of seen now as part of the team, in that world.

So- I mean, I think things like- I said earlier, things like research training and the process of doing a PhD is far more structured than when I did it. And I'm not offering a judgement on whether that's better or worse. There are some things that are good about it, and I think some things which- yes, I'm not convinced.

I think we're- it's actually, we've come quite a long way in terms of the diversity of the people who are you know, learning to be social science researchers and are on that kind of track. But we've still got a long way to go. I had a conversation with someone who's about the same age as myself and we were talking about a particular conference where, again, I've been going for more than 20 years. But I just wanted to check out my impression. I said, "Am I right? Are there more women at this conference than there used to be?" And she said, yes, she thought so too. Though, you know, neither of us had, sort of checked and added it up.

Project data in Quirkos analysis software canvas



<https://www.quirkos.com/workshops/qual/>

**CHOOSE A GROUP OF DOCUMENTS TO  
EXAMINE**



File / folder	Document	
a. Background		
	1. Proposal and rationale.pdf	1
	2. Document management.pdf	1
	3. Call for participants.pdf	2
	4. Project information.pdf	2
	5. Protocol ethics statement and risk assessment.pdf	3
b. Engagement		
	1. Possible email text to recruit.pdf	4
	2. Possible email response to interest.pdf	4
	3. Participant record example.pdf	4
	4. Consent form.pdf	5
	5. Consent form - Google Forms	5
c. Interview facilitation		
	1. Trial question set with reflexive answers.xlsx	6
	2. Interview actions aide-memoire.pdf	6
	3. <b>Interview summaries or field notes</b>	6
d. Transcription and analysis		
	1. Transcription protocol.pdf	7
	2. <b>Transcripts</b>	7
	3. <b>Transcript summaries</b>	7
	4. Transcript return form.pdf	5
	5. Transcript return form - Google Forms	5
	<a href="https://www.quirkos.com/workshops/qual/">https://www.quirkos.com/workshops/qual/</a>	

Files in bold have sub-files of multiple documents

Choose a Break Out Room

## **DISCUSS AND COMMENT**

[HTTPS://JAMBOARD.GOOGLE.COM/D/17T2NORYJVSIFWM013L1Z4M34YJTUPDBY7CSKMBYJXQI/EDIT?USP=SHARING](https://jamboard.google.com/d/17T2NORYJVSIFWM013L1Z4M34YJTUPDBY7CSKMBYJXQI/edit?usp=sharing)



<https://jamboard.google.com/d/17t2NORyJVsIfwm013L1Z4M34yjtupdBY7CSKmBYJxql/edit?usp=sharing>

File / folder	Document	Breakout Room
a. Background		
	1. Proposal and rationale.pdf	1
	2. Document management.pdf	1
	3. Call for participants.pdf	2
	4. Project information.pdf	2
	5. Protocol ethics statement and risk assessment.pdf	3
b. Engagement		
	1. Possible email text to recruit.pdf	4
	2. Possible email response to interest.pdf	4
	3. Participant record example.pdf	4
	4. Consent form.pdf	5
	5. Consent form - Google Forms	5
c. Interview facilitation		
	1. Trial question set with reflexive answers.xlsx	6
	2. Interview actions aide-memoire.pdf	6
	3. <b>Interview summaries or field notes</b>	6
d. Transcription and analysis		
	1. Transcription protocol.pdf	7
	2. <b>Transcripts</b>	7
	3. <b>Transcript summaries</b>	7
	4. Transcript return form.pdf	5
	5. Transcript return form - Google Forms	5
Files in bold have sub-files of multiple documents		

# Workshop outcomes

- Improved understanding of;
  1. What project documentation needs to cover for ethical purposes
  2. How project proforma can be used to support data gathering and analysis processes
  3. Some of the problems and limitations of real project documentation
  4. What might be considered as minimally essential for good practice, as compared with helpful, practical, maximally possible, or un-necessarily burdensome



# Quirkos

Dr Cathy Gibbons

[cathy@quirkos.com](mailto:cathy@quirkos.com)

**TQR 14TH ANNUAL  
CONFERENCE**

February 16-18, 2023

*Workshop: Opening the Black-Box of the  
Quirkos Qualitative Researcher Journeys Project*