Qualitative Methods in Evaluation of Public Health Programs
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Qualitative Methods in Evaluation of Public Health Programs

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INTRODUCTION

Health organizations around the globe regularly make evidence-based decisions for effective health programming. Qualitative evaluation fulfills an important role in rigorous evaluation of programs. The strength of qualitative evaluation is its ability to provide valuable insight into complex issues, which quantitative methods may not provide. Qualitative data sources can answer the “why” behind program successes or challenges. Additionally, qualitative data illuminate the uniquely human side of health programming and bring to light important contextual factors, such as culture, gender, or societal norms. Qualitative evaluation may be used to complement quantitative data, answer a question not accessible quantitatively, or provide a cost-effective data source when one would not otherwise be available.

This syllabus covers a training that is meant to assist health professionals in using qualitative evaluation skills in sound and rigorous evaluation of their program. The sessions go beyond basic concepts to explore important considerations of qualitative methods in the context of rigorous evaluation. Through session content and participatory exercises, participants will gain basic skills in rigorous qualitative data collection, analysis, and use.

This syllabus provides an overview of the ten-day (8.5 working days) training workshop, including presentations, facilitator guides, practical sessions, case studies, and sample agendas.
COURSE DESCRIPTION

Objectives

The purpose of this course is to build participants’ knowledge about the core competencies of the course in order to enhance their capacity to conceptualize, design, develop, govern, and manage qualitative methods in evaluation and use the information generated for improved public health practice and service delivery. This course contextualizes qualitative methods within rigorous evaluation, rather than offering the basics of a qualitative approach.

This course includes a practical component. Participants are asked to contribute a specific program evaluation need that they are aware of. Course organizers choose five program evaluation concepts that are best suited to the course. Small groups will be formed on day 1, and each group will select a real qualitative evaluation for which they will develop a protocol. Throughout the course, time will be allotted to develop the various protocol components, based on sessions covered that day. On the final day of the course, groups will present their draft protocols to the rest of the participants for feedback.

Definition of Rigorous Evaluation

MEASURE Evaluation defines “rigorous evaluation” as an evaluation that follows a clearly specified protocol that is appropriate to address the evaluation question(s) of interest in the context in which the evaluation is being conducted. The protocol should use scientifically-recognized methods to address the question(s) of interest objectively. The protocol should be comprehensive and should discuss threats to the evaluation findings, the extent to which these threats are addressed by the design, and design limitations and their implications for the interpretation of results. Implementation of the evaluation should also be “rigorous.” This means the evaluation should follow recognized scientific standards to ensure that the data quality is good, procedures are ethical, analysis is correctly implemented, results are interpreted appropriately, and information products are well written. Rigorous evaluations should be designed and implemented to ensure that they yield information that is relevant and can inform program decisions. This can be accomplished by engaging stakeholders from the outset and sharing results in appropriate formats for different audiences. Rigorous evaluation can include formative evaluations, process evaluations, outcome evaluations, and impact evaluations.

Core Competencies

At the end of this course, participants will have acquired the qualitative program evaluation competencies listed below.

Competency Categories

- Concepts, approaches, and purposes of qualitative methods in evaluation
- Creating and conceptualizing evaluation questions
- Troubleshooting selected qualitative methods for evaluation
- Discussing the nature of sampling participants in qualitative evaluations
- Developing data collection tools
- Qualitative data analysis techniques
- Fieldwork considerations
- Presentation and dissemination of data
- Quality standards for qualitative inquiry
- Ethical principles for qualitative evaluation, including gender integration
Audience

The course curriculum is designed for participants who have a basic knowledge of program evaluation and qualitative methods. The intended audience is professionals from the monitoring and evaluation (M&E) and health and development fields.

Course Prerequisites

Prior experience (academic or professional) with qualitative methods and public health program evaluation is required. For example, it would be beneficial for participants to have already taken a basic course in qualitative methods and have conducted evaluations.

A short list of required reading is included with the course, which should be completed beforehand. Additional references are included for participants wishing to learn more about each session topic. In addition, participants ideally should come with information and resources on the program for which they will design an evaluation for the groupwork component of the course.

Curriculum Summary

The course consists of 12 sessions covering the key aspects of rigorous qualitative evaluation. The total duration of the course is 65 hours, to be covered over 10 days of in-person instruction, including time for practical application. Detailed competencies and learning objectives are included in the appendices, along with the agenda.

Sessions

1. Introduction to Paradigms and Qualitative Evaluation
2. Creating and Conceptualizing Qualitative Evaluation Questions
3. Troubleshooting in Selected Qualitative Methods for Evaluation
4. Developing Data Collection Tools
5. Sampling Strategies and Saturation
6. Qualitative Data Analysis Techniques for Drawing Themes
7. Qualitative Data Analysis: Hands-On
8. Quality Research Standards for Qualitative Inquiry: Trustworthiness
9. Developing a Fieldwork Plan for Qualitative Evaluation
10. Data Presentation and Dissemination
11. Key Ethical Principles in Qualitative Evaluation
12. Integrating Gender into Your Evaluation

Teaching Methods

Course delivery is based on adult learning principles. A range of teaching methods, such as lectures, discussions, case studies, exercises, and group work, will address participants’ varying learning styles. Each module includes varied teaching approaches for its activities.
Course Materials

The course materials include digital copies of the following:

- Course syllabus
- Facilitators’ guide
- PowerPoint presentations
- Case study
- Group exercises
- Examples of relevant tools/guides
- Additional reference materials

Course Evaluation

The following are the recommended course evaluation methods:

- Pretests and post-tests covering all 12 sessions
- Simple daily participants’ evaluation form for facilitators to review covering the following:
  - Was content clear?
    - Were the facilitators prepared and organized in conducting the session?
    - Overall impression of the day (use a scale)

- Final evaluation, stressing the following:
  - Overall impressions
  - Comments on specific module presentations
  - Group comments and ranking
  - What worked best; what did not work
  - Suggestions for improvement (general and specific suggestions)

- Assessment of facilitators
# APPENDIX 1. CORE COMPETENCIES AND LEARNING OBJECTIVES

<table>
<thead>
<tr>
<th>Characterization of qualitative evaluation</th>
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<tbody>
<tr>
<td>Discuss major concepts, approaches, and types of qualitative methods in evaluation, including the purpose of using qualitative methods in evaluation as well as discussing the use of mixed-methods.</td>
</tr>
<tr>
<td>LO1: Understand and compare the four major paradigms of evaluation.</td>
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<tr>
<td>LO2: Compare and contrast the use of qualitative methods for evaluation with other approaches.</td>
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<tr>
<td>LO3: Establish the appropriateness of the use of mixed-methods of evaluation.</td>
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<tr>
<th>Evaluation questions and theory of change</th>
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<tr>
<td>Identify evaluation questions that are appropriate for qualitative methods. Analyze the theory of change of the program in order to identify relevant evaluation question(s) for qualitative assessment.</td>
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<tr>
<td>LO1: Use the program’s theory of change to identify key questions that can be answered using different types of qualitative evaluation.</td>
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<td>LO2: Conceptualize key components of evaluation questions.</td>
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<th>Methods</th>
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<tr>
<td>Assess and select appropriate methods for qualitative evaluations.</td>
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<tr>
<td>LO1: Explain the pros and cons of selected qualitative methods for rigorous evaluation.</td>
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<tr>
<td>LO2: Describe methods to mitigate common problems in qualitative evaluation.</td>
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<tr>
<th>Data collection tools: Develop data collection tools that reflect the evaluation question</th>
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<tr>
<td>Design various data collection tools appropriate for addressing specific evaluation questions: in-depth interviews, focus group discussions, and observation guides.</td>
</tr>
<tr>
<td>LO1: Identify specific tools used for various qualitative data collection approaches.</td>
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<tr>
<td>LO2: Describe the structure and components of qualitative data collection tools.</td>
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<td>LO3: Demonstrate the use of probes to elicit in-depth responses.</td>
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<tr>
<td>Utilize appropriate data collection tools to address an evaluation question.</td>
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<td>LO4: Outline sets of questions that can address specific study objectives in data collection instruments.</td>
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<td>LO5: Demonstrate the logical flow of questioning in a data collection tool.</td>
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<tr>
<th>Methods/design: Sampling considerations</th>
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<tr>
<td>Discuss the nature of sampling participants in qualitative evaluations.</td>
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<tr>
<td>LO1: Discuss types of sampling strategies employed in qualitative evaluations.</td>
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<tr>
<td>LO2: Explain the concept of data saturation and how to identify it.</td>
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<tr>
<td>LO3: Discuss factors that have an impact on the sampling strategy, including the emergent nature of qualitative evaluation.</td>
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<tr>
<td>LO4: Discuss strategies to reduce bias in sampling.</td>
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<tr>
<th>Analysis: Appropriately select qualitative data analysis techniques to develop evaluation question-relevant themes drawing on the evidence</th>
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<tr>
<td>Demonstrate the relevance of various qualitative data analysis techniques for evaluation: validate and utilize themes that can address the evaluation questions.</td>
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<tr>
<td>LO1: Explain qualitative data analysis and its approaches.</td>
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<tr>
<td>LO2: Describe stages in conducting qualitative analysis.</td>
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<tr>
<td>LO3: Develop a coding structure for categorizing data.</td>
</tr>
<tr>
<td>LO4: Apply an analytic method for drawing themes.</td>
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</tbody>
</table>
Develop a data analysis plan for a qualitative evaluation.

**LO5:** Design an analysis plan using a selected analytical technique.

**LO6:** Understand main practicalities of analysis for evaluation.

**LO7:** Demonstrate use of different qualitative analysis software and their applicability to specific analytical steps.

### Applying qualitative norms in research: Understand and apply approaches to strengthen trustworthiness of the findings from qualitative evaluation

Debate the philosophical underpinnings of trustworthiness (quality research standards for qualitative inquiry).

**LO1:** Describe the various approaches and principles of establishing quality in qualitative evaluation.

Illustrate the practical application of trustworthiness in qualitative evaluation.

**LO2:** Justify the choice of approach to qualitative norms to be applied for a particular study.

**LO3:** Develop a plan for establishing trustworthiness in a qualitative component of an evaluation.

### Fieldwork considerations

Discuss practical constraints and requirements in qualitative evaluation, and develop a fieldwork plan that takes this into consideration.

**LO1:** Understand what qualitative data collection in evaluation requires.

**LO2:** Outline field data collection, identify timeline components, and find potential solutions to timing constraints.

**LO3:** Describe key components of a field data collection budget and potential solutions to budget-related constraints.

**LO4:** Describe the interviewer field team: hiring, training, and field supervising needs.

**LO5:** Understand considerations related to the funding agency or government regulatory body requirements.

**LO6:** Recognize the special considerations, including gender issues, required for qualitative methods and the management of crisis during fieldwork.

### Data presentation and dissemination

Evaluate the appropriateness of various types of data presentation for particular audiences.

**LO1:** Organize evaluation findings in a coherent and clear story line.

**LO2:** Propose and negotiate the report format and dissemination plan with stakeholders.

**LO3:** Demonstrate how dissemination will be appropriate for various stakeholders, including potentially vulnerable or special populations.

**LO4:** Formulate a dissemination plan that provides actionable recommendations based on qualitative data.

### Illustrate ethical principles for qualitative evaluation and how those apply to evaluation

Identify and address ethical, gender-related, and political implications of, and considerations in, evaluation work.

**LO1:** Specify the basic tenets of ethical protocols for field data collection.

**LO2:** Identify special ethical considerations in qualitative evaluation when using methods such as case studies, focus group discussions, interviews, or observations.

**LO3:** Describe ethical and gender-related issues in evaluation design, data collection, analysis, and dissemination/use.

**LO4:** Understand the potential influence of political and cultural contexts in evaluation.

Design an ethically acceptable qualitative component of an evaluation.

**LO5:** Given a specific evaluation context or area/location, identify potentially vulnerable or special populations.

**LO6:** Describe types of consent for data collection and basic components of a consent form.

**LO7:** Explain data security considerations and steps to ensure data security.
APPENDIX 2. SESSION OVERVIEWS

Session 1. Introduction to Paradigms and Qualitative Evaluation

Session Objectives

By the end of this session, participants will be able to do the following:

- Understand and compare the four major paradigms of evaluation
- Compare and contrast the use of qualitative methods for evaluation with other approaches
- Establish the appropriateness of the use of mixed-methods of evaluation

Topics Covered

- Four major paradigms with respect to evaluation in health systems
- Strengths and weaknesses of various philosophical approaches to evaluation
- Introduction to qualitative evaluation
- Introduction to mixed-methods evaluation
- Types of qualitative assessment

Required Reading


Further Reading

None

Session 2. Creating and Conceptualizing Qualitative Evaluation Questions

Session Objectives

By the end of this session, participants will be able to do the following:

- Use the program theory of change to identify key questions that can be answered using different types of qualitative evaluation
- Conceptualize key components of evaluation questions

Topics Covered

- Creating questions appropriate to the type of evaluation planned
- Aligning evaluation questions with program theory of change
- Conceptualizing evaluation questions

Required Reading

Further Reading


**Session 3. Troubleshooting in Selected Qualitative Methods for Evaluation**

**Session Objectives**

By the end of this session, participants will be able to do the following:

- Explain the pros and cons of selected qualitative methods for rigorous evaluation
- Describe methods to mitigate common problems in qualitative evaluation

**Topics Covered**

- Strengths, challenges, and considerations in using selected qualitative methods of data collection, such as participant observation, focus group discussions, and interviews
- Techniques for mitigating or managing challenges in qualitative data collection

**Required Reading**

None

**Further Reading**


**Session 4. Developing Data Collection Tools**

**Session Objectives**

By the end of this session, participants will be able to do the following:

- Identify specific tools for qualitative data collection
- Describe the structure and components of qualitative data collection tools
- Outline sets of questions that can address specific evaluation components in data collection instruments
- Demonstrate the use of probes to elicit in-depth responses
- Design tool with logical flow of questions

**Topics Covered**

- Structure of qualitative data collection tools
- Techniques for achieving flexibility
- Using enabling techniques
- Preparing data collection tools
Session 5. Sampling Strategies and Saturation

Session Objectives

By the end of this session, participants will be able to do the following:

- Discuss types of sampling strategies employed in qualitative evaluation
- Explain the concept of data saturation and how to identify this
- Discuss factors that have an impact on the sampling strategy, including the emergent nature of qualitative evaluation
- Discuss strategies to reduce bias in sampling

Topics Covered

- Types of qualitative sampling approaches
- The concept of data saturation
- Factors to consider when sampling
- Reducing biases in sampling

Required Reading


Further Reading


Session 6. Qualitative Data Analysis Techniques for Drawing Themes

Session Objectives

By the end of this session, participants will be able to do the following:

- Explain qualitative data analysis and its approaches
- Describe stages in conducting qualitative analysis
- Develop a coding structure for categorizing data
- Apply analytical method for drawing themes

Topics Covered

- Overview of qualitative analysis
- Techniques for drawing themes
- Coding qualitative data
- Identifying and reviewing themes

Required Reading


Further Reading


Session 7. Qualitative Data Analysis: Hands-On

Session Objectives

By the end of this session, participants will be able to do the following:

- Design an analysis plan using a selected analytical technique
- Understand main practicalities of analysis for evaluation
- Demonstrate use of different qualitative analysis software and their applicability to specific analytical steps
Topics Covered

- Review of analysis process and main analytical techniques
- Designing the steps of an analysis plan using selected analytical techniques and strategies including content analysis, thematic analysis, and discourse analysis
- Deciding on an analysis plan: creating an analysis chart
- Finding gaps and emerging data
- Using qualitative software to help with analysis (demonstration using qualitative software)
- Creating and applying codes
- Generating outputs

Required Reading


Further Reading


Session 8. Quality Research Standards for Qualitative Inquiry (Trustworthiness)

Session Objectives

By the end of this session, participants will be able to do the following:

- Discuss the relevance of trustworthiness in qualitative evaluations
- Justify the choice of qualitative approach to be applied to a particular evaluation
- Develop a plan for establishing trustworthiness in a qualitative component of an evaluation

Topics Covered

- Trustworthiness with respect to evaluation in health systems
- Practical application of trustworthiness and programs

Required Reading


14 Qualitative Methods in Evaluation of Public Health Programs
Further Reading


**Session 9. Developing a Fieldwork Plan for Qualitative Evaluation**

**Session Objectives**

By the end of this session, participants will be able to do the following:

- Understand what qualitative data collection in evaluation requires
- Outline field data collection, identify timeline components, and find potential solutions to timing constraints
- Describe key components of a field data collection budget and potential solutions to budget-related constraints
- Describe the interviewer field team—hiring, training, and field supervising needs
- Understand considerations related to the funding agency or government regulatory body requirements
- Recognize the special considerations required for qualitative methods and the management of crisis during fieldwork

**Topics Covered**

- From A to Z in qualitative evaluation fieldwork
- Fieldwork: time and budget
- Fieldwork team: aspects of quality and care
- Agencies and government regulatory aspects
- Special considerations in qualitative evaluation
- Management of crisis during fieldwork

**Required Reading**


**Further Reading**


Session 10. Data Presentation and Dissemination

Session Objectives

By the end of this session, participants will be able to do the following:

- Organize evaluation findings in a coherent and clear storyline
- Propose and negotiate the report format and dissemination plan with stakeholders
- Demonstrate how dissemination will be appropriate for various stakeholders, including potentially vulnerable or special populations
- Formulate a dissemination plan that provides actionable recommendations based on qualitative data

Topics Covered

- Writing a report for the funding agency; writing a report for government program
- Report review: clarifications and changes after external reviewers’ comments
- Presenting results with funders and mandatory evaluations: using evaluation results for recommended changes and program modification
- How to disseminate results (report, sharing results with community, scientific paper)
- Presenting results to different audiences (presenting sensible results)
- What to show, how to show, and where to show in order to ensure the use of results

Required Reading


Further Reading

Centers for Disease Control and Prevention, National Center for Chronic Disease Prevention and Health Promotion, Office on Smoking and Health, Division of Nutrition, Physical Activity and Obesity. (2013). Developing an effective evaluation report: Setting the course for effective program evaluation. Atlanta, Georgia: CDC. Retrieved from https://www.cdc.gov/eval/materials/developing-an-effective-evaluation-report_tag508.pdf


Session 11. Key Ethical Principles in Qualitative Evaluation

Session Objectives

By the end of this session, participants will be able to do the following:

- Specify the basic tenets of ethical protocols for field data collection
- Given a specific evaluation context or area/location, identify potential vulnerable or special populations
- Describe types of consent for data collection and basic components of a consent form
• Identify special ethical considerations in qualitative evaluation when using methods such as case studies, focus group discussions, interviews, or observations
• Explain data security considerations and steps to ensure data security
• Describe ethical issues in evaluation design, data collection, analysis, and dissemination/use
• Understand potential influence of political and cultural context in evaluation

Topics Covered

• What a protocol/evaluation plan must have in respect to the basics of ethics in evaluation (informed consent, freedom/leaving the evaluation, equal opportunities, anonymity, confidentiality, no harm/harm reduction)
• Cultural aspects of evaluation topics, how evaluation and qualitative techniques can lead to subject vulnerability
• Ethical aspects of qualitative inquiry
• Institutional review and informed consent
• Reporting sound data, reviewing with funding agency and government
• Confidentiality and anonymity in reporting

Required Reading


Further Reading


Session 12. Integrating Gender into Your Evaluation

Session Objectives

By the end of this session, participants will be able to do the following:
• Define gender and related terms
• Identify why gender is important to qualitative evaluation of public health programs
• Describe gender issues in qualitative evaluation design, data collection, analysis, and dissemination/use

Topics Covered

• Key gender-related definitions
• Importance of gender to health outcomes
• Sex-disaggregation in qualitative data
• Gender-sensitive measures in qualitative data
• How gender matters in the qualitative evaluation design
• Impact of gender-related norms on data collection logistics
• Gender integration in analysis and use of qualitative data
• Gender biases in data collection and analysis
Required Reading

Further Reading


## Appendix 3. Qualitative Methods in Public Health Evaluation Short Course: Agenda

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<tr>
<td>Registration</td>
<td>Session 1:</td>
<td>Session 3:</td>
<td>Session 5:</td>
<td>Session 6:</td>
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<td>Session 8:</td>
<td>Session 11:</td>
<td>Session 12:</td>
<td>Group presentations (3)</td>
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<td>9:00–10:30a</td>
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<td>Troubleshooting in Selected Qualitative Methods for Evaluation</td>
<td>Sampling Strategies and Saturation</td>
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<td>Qualitative Data Analysis: Hands-On</td>
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<td>Key Ethical Principles in Qualitative Evaluation</td>
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<td>Session 6:</td>
<td>Session 7:</td>
<td>Session 8:</td>
<td>Session 11:</td>
<td>Session 12:</td>
<td>12:30–1:00p Closing/evaluation</td>
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<tr>
<td>Introduction to Paradigms and Qualitative Evaluation</td>
<td>Creating and Conceptualizing Qualitative Evaluation Questions</td>
<td>continued</td>
<td>Sampling Strategies and Saturation</td>
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<td>Qualitative Data Analysis Techniques for Drawing Themes</td>
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<td>Integrating Gender into Your Evaluation</td>
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<td>Group dinner offsite—location TBD</td>
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<td>Session 10:</td>
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<td>Developing Data Collection Tools</td>
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## APPENDIX 4. ADVISORY COMMITTEE

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<tr>
<td>Jessica Fehringer</td>
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<tr>
<td>Carolina Mejia</td>
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</tr>
<tr>
<td>Elizabeth Archer</td>
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<td>Sunil George</td>
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<tr>
<td>Hemali Kulatilaka</td>
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<tr>
<td>Liz Millar</td>
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<tr>
<td>Pilar Torres</td>
<td>Member</td>
<td>National Institute of Public Health (INSP), Mexico</td>
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## APPENDIX 5. CURRICULUM CONTRIBUTORS

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<tr>
<td>Session 12</td>
<td>Brittany Iskarpatyoti</td>
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REFERENCES


