

# Qualitative Methods

## Sequence, 11 sessions

Qualitative research uses various methods to collect data that are not numerical in nature (texts, videos, diagrams). When used in research with humans, it is essential in improving our understanding about why things happen as they do.

This curriculum separates qualitative from quantitative methods but only for the purposes of planning and organising. In practice, CARTA strongly recommends that you combine these areas through an integrated and multidisciplinary approach. This sequence provides logical steps to build sufficient qualitative skills for PhD students to appreciate the process and contribution of qualitative research. However, it is best taught in tandem with quantitative approaches to research.

Students gain and practise skills and understanding of qualitative methods through integrated activities, in particular:

[Posters: Applying Research Methods](#)

[Spiderweb – Social Determinants](#)

[Journal Clubs](#).

Qualitative methodology is introduced in an earlier sequence in this curriculum:

- [Research Question and Methodology](#)

A later sequence – once researchers have collected data – revisits the analysis of qualitative data:

- [Qualitative Data Analysis](#)

Download [the curriculum](#) for this sequence.

### Outcomes

By the end of this sequence of sessions, together with the sessions on quantitative and mixed methods, students can:

- Select the appropriate research study design for their chosen study.
- State the limitation(s) of various research methodologies.
- Understand how to generate, manage and analyse qualitative data.

### Timetable

Your institution and resources will determine how you schedule this training. You might:

- Use a four-week block release system. This is cost effective when convening students from different geographies.
- Run the sequence a week or a few days at a time, to pace the input to your cohort of students and bring different disciplines together.

In whatever way you schedule and integrate this training, students need to meet certain milestones in order to move ahead on their PhD journey. Most important is to bring students together to:

- Support and motivate each other. Students who are skilled in one area assist those whose strengths lie elsewhere.
- Reinforce the value of multiple views on an issue.
- Teach certain aspects that individual supervisors would otherwise have to cover.

This sequence of sessions, together with sessions on quantitative and mixed methods, supports students to:

- Develop or strengthen their PhD research protocol.
- Understand the methods that are used in qualitative research
- Gain or strengthen core skills in data management and analysis.
- Evaluate different research methods and select the most appropriate design for their research.

### Preparation

*For you as the facilitator*

These books and papers are useful references for this sequence of sessions.

- Becker, H. S. (1998). *Tricks of the Trade: How to Think About Research While Doing It*. Chicago: University of Chicago Press.

- Berg, B. L. (2001). *Qualitative Research Methods for the Social Sciences* (4 ed.). Boston: Allyn and Bacon.
- Bernard, H. R. (2006). *Research Methods in Anthropology* (4 ed.). Lanham: Altamira.
- Bradshaw, M. B., & Stratford, E. (2010). *Qualitative research design and rigour*.
- Bryman, A. (2012). *Social Research Methods* (4 ed.). Oxford: Oxford University Press.
- Charmaz, K. (2014). *Constructing Grounded Theory* (2 ed.). London: SAGE.
- Flick, U. (2014). *An Introduction to Qualitative Research* (5 ed.). London: SAGE.
- Hammersley, M., & Atkinson, P. (2007). *Ethnography: Principles in practice* (3 ed.). London: Routledge.
- Mantzoukas, S. (2008). [Facilitating research students in formulating qualitative research questions](#). *Nurse Education Today*, 28(3), 371-377.
- Ritchie, J., Lewis, J., McNaughton Nicholls, C., & Ormston, R. (2013). *Qualitative Research Practice* (2 ed.). London: SAGE.
- Seale, C. (1999). [The Quality of Qualitative Research](#). London: SAGE.
- Silverman, D. (2015). *Interpreting Qualitative Data* (5 ed.). London: SAGE.

A number of these sessions involve work in small groups. Identify appropriate skilled quantitative researchers to act as resource people in order to:

- Participate as small-group facilitators.
- Answer students' questions in open discussion.
- Provide input and guidance during group activities.
- Discuss their personal experiences of conducting qualitative research.

Ensure that resource people are familiar with the participatory [approach](#), have read all the sessions that make up this sequence, and engage informally, rather than giving lectures or instructions.

You can run this sequence of sessions as face-to-face teaching, on-line or a blend of the two. For online elements, organise an online platform where students upload and comment on exercises. Ensure that you have tech support on hand.

### Assessment

To track and evaluate students' progress and capacities, review their:

- Protocol writing skills.
- Qualitative data analysis exercise.
- Quantitative data analysis exercise.
- Use of qualitative data analysis software.

### Sessions

## Session 1. Research Paradigm | **As needed**

In this session, portray critical thinking as a core academic skill, essential for developing a research proposal. Your aim is to train PhD students to question and reflect on their own knowledge and on information or evidence presented to them. Students gain the skills to interpret the world as it is, from subjective experience and to apply meaning-oriented research methodologies that rely on a subjective relationship between the researcher and participants.

Qualitative research techniques are used to help us understand how people interpret and interact within their social environment. Interpretive research is a paradigm based on the assumption that social reality is multi-layered and complex, shaped by human experiences and social contexts (ontology). A single phenomenon can have multiple interpretations and is therefore best studied within its socio-historic context by reconciling the subjective interpretations of its various participants (epistemology).

### Outcomes

By the end of the session, students can:

- List research paradigm properties.
- Describe the difference between positivism and interpretivism.
- Define interpretivist qualitative research paradigm.
- Describe the scientific qualitative research process.

- Differentiate research analysis from any other analysis.

### Preparation

Invite experienced qualitative researchers to read students' comments and give feedback.

Develop or source a presentation to introduce concepts.

### Steps

Introduce, explain, and invite students' questions and discussion on:

- Qualitative research thinking.
- Research paradigm properties in interpretive qualitative research.
- Positivism versus interpretivism.
- Stages in designing qualitative research.
- Everyday vs research analysis.

## Session 2. Research Study Designs | As needed

Research study design is a framework, or the set of methods and procedures used to collect and analyse data on variables specified in a particular research problem. Highlight the importance of a clear study design in a research protocol.

Qualitative research design is extensively used for studying human behaviour, opinions, themes and motivations and entails a systematic inquiry into social phenomena in natural settings. Phenomena can include (but are not limited to) how people experience aspects of their lives, how individuals and/or groups behave, how organizations function, and how interactions shape relationships.

This session introduces qualitative study designs commonly used in research related to public and population-health, including:

- Grounded theory.
- Ethnography.
- Action research.
- Phenomenological research.
- Participatory action research.

### Outcomes

By the end of this session, students can write up a clear study design as part of their research protocol. Specifically, they can:

- Identify the most commonly used qualitative designs in public and population health research.
- Describe the main features of six types of qualitative research designs.
- Critique the design sections of qualitative research studies.

### Preparation

Develop or source a presentation to introduce the most common types of qualitative research design.

Invite experienced qualitative researcher/s to participate in order to:

- Share their lived experiences of conducting qualitative research (Step 2).
- Give input in response to student groups' critiques of qualitative papers (Step 3).

Print copies or share the link to the key resource:

Tong, A., Sainsbury, P., Craig, J. (2007). [Consolidated criteria for reporting qualitative research \(COREQ\)](#): a 32-item checklist for interviews and focus groups. *International Journal for Quality in Health Care*, Volume 19, Issue 6, December 2007, pages 349–357

### Steps

Time	Step	Who
As needed	1. Introduce qualitative research design	Facilitator
As needed	2. Present lived experience of qualitative research	Invited researcher/s
As needed	3. Critique qualitative papers	Small groups
As needed	3. Present and discuss critiques	Groups to plenary

### **Step 1. Introduce qualitative research design**

*As needed*

Give a presentation to introduce the most common types of qualitative research design.

### **Step 2. Present lived experience of qualitative research**

*As needed*

An invited researcher describes their lived experience of conducting specific designs of qualitative research. They identify and explain which design/s they used and why. Invite questions from students and discussion.

### **Step 3. Critique qualitative papers**

*As needed*

Divide students into small working groups. Give them three published qualitative research articles to critique, using the COREQ list in [Tong, A \(2007\)](#).

### **Step 4. Present and discuss critiques**

*As needed*

Each group presents their critique in brief. Invite discussion about the exercise. Include input from the invited researcher/s.

## **Session 3. Formulating a Qualitative Research Question | 8 hours**

This session guides PhD students to design their research questions and to link these to study aims, objectives and methods. A good research question does not automatically lead to credible research, but a poorly conceived one is likely to create problems at every stage of research.

Formulating a research question requires a reflective and interrogative process – explain that the researcher goes back and forth and redefines the question until they reach the right formulation. The process is connected with other aspects of the study including:

- The theoretical and conceptual framework.
- The research design.
- Data collections methods.
- Prior research findings.
- Practical issues.
- Contexts in which a study will be conducted.

“The research process – the order in which you do things, the methods you use – will depend on the question that you ultimately decide on.”

In qualitative studies, the ongoing process of questioning is integral in understanding the unfolding lives and perspectives of others. Throughout the research process, as things come up, the researcher’s understanding might shift. This is why a qualitative research question often contains terms such as “lived experience”, “personal experience”, “understanding”, “meaning” and “stories”.

## Outcomes

By the end of the session, students can:

- Describe factors to consider when formulating a research question.
- Differentiate qualitative from quantitative research questions.
- Formulate an appropriate qualitative research question.

## Preparation

Create or source a presentation to introduce the process of developing research questions.

Identify and invite a qualitative researcher to facilitate and guide each small group as students formulate research questions.

Prepare to screen or share the link to this video on [Developing a Qualitative Research Question](#).

## Steps

Time	Step	Who
As needed	1. Explain the process of developing research questions	Facilitator
As needed	2. Select a research topic	Small groups

### ***Step 1. Explain the process of developing research questions***

*As needed*

In your presentation and discussion, cover these topics:

- Qualitative vs quantitative research questions.
- How research questions account for tentative theories about the phenomena.
- Reflexivity in developing qualitative research questions.
- Writing good qualitative questions.

Screen and discuss the [video](#).

### ***Step 2. Select a research topic***

*As needed*

Divide students into small groups, with an experienced qualitative researcher to facilitate each group as they work together to:

- Select a research topic.
- Formulate a qualitative research question, study aim, and specific objective.

## Session 4. Sampling Strategies for Qualitative Research | 4 hours

Qualitative researchers make sampling choices to enable a deep understanding of the phenomenon they are studying. In this session, examine:

- Sampling techniques that qualitative researchers typically employ.
- Types of samples that qualitative researchers are most likely to use.

Provide guidance on choosing an appropriate sampling strategy for a study design. covering: determining the sample size and the use of theoretical saturation.

## Outcomes

By the end of these steps, students can:

- Justify the application of various qualitative sampling techniques.
- Identify the different types of sampling techniques.
- Explain how the principle of saturation is applied in qualitative research.

## Preparation

Develop or source a presentation to explain qualitative research sampling.

## Steps

Time	Step	Who
As needed	1. Explain qualitative research sampling	Facilitator
As needed	2. Develop a sampling strategy	Small groups
As needed	3. Share and compare sampling strategies	Plenary

### **Step 1. Explain qualitative research sampling**

*As needed*

In introducing qualitative research sampling, cover:

- Types of qualitative sampling techniques commonly used in health research including purposive, snowball, theoretical sampling.
- Sample size for qualitative research.
- Data saturation.

### **Step 2. Develop a sampling strategy**

*As needed*

In the same small groups from the previous session, students develop a sampling strategy for their chosen qualitative research topic. Small-group facilitators provide responsive input.

### **Step 3. Share and compare sampling strategies**

*As needed*

Groups present and compare their sampling strategies.

## Session 5. Qualitative Data Collection Methods | **As needed**

Typical qualitative research is flexible, open ended, and responsive to the context. In the same way, the steps of data collection and analysis tend not to be separate and consecutive. Sampling, data collection, analysis, and interpretation are related to each other in an iterative manner. The researcher makes informed decisions along the way with regard to the choice of methods and how to implement them. This may entail several back-and-forth steps between data collection and analysis. New insights and experiences may necessitate a revision of the research question and/or the research design as a whole. The process ends when saturation is achieved.

Various data collection methods are used in qualitative research, including:

- In-depth interviews.
- Focus group discussions (FGD).
- Case studies.
- Narratives.
- Observations.
- Life histories.
- Body mapping.
- Discourse analysis.

The most common methods, particularly in healthcare research, are the first two – interviews and focus groups.

In this session, introduce data collection methods that are commonly used in qualitative research and facilitate your students' deeper knowledge of and skills in using some of these methods.

## Outcomes

By the end of these steps, students can:

- Select an appropriate data collection method for the research question.
- Design a semi-structured interview guide.
- Conduct in-depth interview.
- Voice record and transcribe data.

## Preparation

Develop or source a presentation to introduce methods of qualitative data collection.

Identify and invite a qualitative researcher to speak informally, from personal experience, about methods of data collection in qualitative research and to engage in discussion with students and answer their questions.

## Assessment

Assess and give feedback on students':

- Semi-structured interview guide.
- FGD video critique.
- Transcripts.

## Steps

Time	Step	Who
As needed	1. Introduce methods of qualitative data collection	Facilitator
As needed	2. Discuss experience of data collection	Resource person
As needed	3. Design a data-collection tool	Small groups
	4. Conduct, review and transcribe IDIs	Individual students
	5. Introduce and critique an FGD	Individuals, group
	6. Conduct an observation exercise	Individuals, plenary

### ***Step 1. Introduce methods of qualitative data collection***

*As needed*

Give or share a PowerPoint presentation on qualitative data collection methods.

### ***Step 2. Discuss experience of data collection***

*As needed*

Experienced qualitative researcher/s whom you invited share their real-life experiences and address students' questions.

### ***Step 3. Design a data-collection tool***

*As needed*

In their established small groups and with facilitators' support, students design an interview guide aligned with the research question each group chose in the earlier session.

### ***Step 4. Conduct, review and transcribe in-depth***

*As needed*

Using the designed interview guide, each member of the small group conducts an eight-minute interview, video records it and uploads it to the shared online platform.

Then ask participants to reflect on the exercise. What did they learn about the process as well as from the answers to the questions? Play a few of the videos to the full group and invite constructive discussion. Drawing out broader lessons from the activity.

Each student audio-records the first 20 minutes of their interview and transcribes it. Students upload their transcriptions to the learning platform for your feedback.

### **Step 5. Introduce and critique a FGD**

*As needed*

Show the video of one of the focus group discussions. Students watch the video, critique it, and either upload their comments on the learning platform or discuss their comments in plenary.

### **Step 6. Conduct an observation exercise**

*As needed*

Show another of the videos and ask students to hand write their observations. In plenary, draw lessons from the exercise.

## **Session 6. Qualitative Data Management and Analysis | As needed**

In this session, provide an overview of data management and analysis. Introduce qualitative data analysis approaches including:

- Qualitative content analysis.
- Narrative analysis.
- Discourse analysis.
- Thematic analysis.
- Grounded theory (GT).
- Interpretive phenomenological analysis (IPA).

Your aim is to equip students to write a compelling data analysis plan as part of their research protocol. Their plan must include strategies to ensure that their qualitative data is reliable.

'Reliability' in qualitative research refers to the stability of responses to multiple coders of data sets. It can be enhanced by detailed field notes that the researcher record on a device and then transcribes.

'Trustworthiness' is achieved by credibility, authenticity, transferability, dependability, and confirmability in qualitative research.

To achieve reliability and trustworthiness requires long engagement in the field and the triangulation of data sources, methods, and investigators to establish credibility. In qualitative research, researchers recognise that the results will be subject to change and instability, rather than seeking reliability.

### **Outcomes**

By the end of the session, students can:

- Describe strategies to ensure reliability of qualitative research data.
- Define specific strategies and techniques including triangulation, participant validation, the strategic sequencing of methods, thick description, dialogic engagement, multiple coding and structured reflexivity practices.
- Differentiate various approaches to qualitative data analysis.
- Describe iterative, recursive and triangulation features in qualitative data analysis.

### **Steps**

Cover these topics:

- Ensuring validity of qualitative data.
- Triangulation, participant validation, the strategic sequencing of methods, thick description, dialogic engagement, multiple coding, and structured reflexivity practices.
- Differentiating between various approaches to qualitative data analysis.
- Iterative, recursive, and triangulation features in qualitative data analysis.



## Session 7. Selecting Software to Manage Qualitative Data | *As needed*

Open a discussion with your students on the role, benefits, and limitations of the various qualitative data analysis software programs. The number of researcher-designed (and -tested) software programmes for qualitative data analysis continues to grow, offering a variety of choices. Students need the skills to identify software programmes, compare them and use them in practice.

### Outcomes

By the end of the session, students can:

- Describe various software programmes available for managing qualitative data.
- Identify the pros and cons of using software for qualitative analysis.

### Preparation

Prepare or link to:

- A presentation on software (Step 1).
- A set of criteria for reviewing software programmes (Step 3).
- Guidance on how to write about software (Step 5).

Identify three qualitative research journal articles in which the methods section documents the use of software (Step 2).

### Steps

Time	Step	Who
As needed	1. Give overview of qualitative data-analysis software programs	Facilitator
As needed	2. Critique methods sections on software	Resource person
As needed	3. Review programmes against criteria	Small groups
As needed	4. Discuss pros and cons of software	Individual students

#### ***Step 1. Give overview of qualitative data-analysis software programs***

*As needed*

Present or share a PowerPoint to give an overview of software programs.

#### ***Step 2. Critique methods sections on software***

*As needed*

Ask students to review three qualitative research journal articles. Their critique must focus on how each of the methods sections documents the use of software. Each student uploads a summary of their critique to the platform and comments on others' critiques.

#### ***Step 3. Review programmes against criteria***

*As needed*

Each student identifies two qualitative data management programmes to compare and contrast against a set of criteria (including cost, functionality and collaboration). They upload and comment on their conclusions on the platform or in groups or plenary.

#### ***Step 4. Discuss pros and cons of software***

*As needed*

Engage students in discussing the general considerations that affect the decision whether to use software to analyse qualitative data. Together, review common features of qualitative data analysis software.

#### ***Step 5. Write about software in***

As needed

Provide guidance on how to write about students' chosen software in their research protocols.

## Session 8. Life Histories | 1 hour

Introduce this unique qualitative methodology – life histories or event histories.

### Outcomes

By the end of this session, students can:

- Describe life histories as a qualitative method.
- Appreciate the strengths of life histories as a research method.
- Outline the steps in conducting a life history.

### Preparation

Atkinson, R. (2012). [The Life Story Interview as a Mutually Equitable Relationship](#). Handbook of interview research: Context and method. London: SAGE Publications.

## Session 9. Coding Qualitative Data in NVivo | 8 hours, spread over a week

Coding is a key component of most qualitative data paradigms. This session equips students with the skills to apply thematic analysis coding in NVivo, covering the main steps:

- Initial coding.
- Generating a codebook with a team.
- Generating themes.
- Applying thematic coding to qualitative transcripts.

The session is framed around NVivo software, but you can substitute with any other qualitative data management programme.

The session is divided into three distinct sections, which you can space out over the course of a week. Students build on what they learned about qualitative analysis (Session 6) in order to develop qualitative coding skills. Students then apply their coding skills to the transcripts for the project on [Posters: Applying Research Methods](#).

### Outcomes

By the end of this session, students can:

- Describe the steps required to code qualitative data.
- Create a project for qualitative analysis in NVivo.
- Create inductive and deductive codes in NVivo.
- Apply a codebook to code transcripts in NVivo.

### Preparation

As facilitator

- Ensure you have the transcripts for the project on [Posters: Applying Research Methods](#) and can share them with the students (Step 1).
- Source online tutorials and provide students with links (Step 1).
- Prepare or link to a PowerPoint presentation on creating a code book (Step 2).

For students

For this session, students prepare to create a Project and upload transcripts onto NVivo on their personal laptops.

They read and come prepared to discuss this paper:

- Erlingsson, C. and Brysiewicz, P., (2017). [A hands-on guide to doing content analysis](#). African journal of emergency medicine, 7(3), pp.93-99.

## Assessment

See the project on [Posters: Applying Research Methods](#).

## Steps

Time	Step	Who
30 minutes	1. Upload transcripts	Individual students
90 minutes	2. Learn how to develop a codebook	Individual students
3 hours	3. Learn how to manage coding	Plenary
2 hours	4. Develop a codebook	Small groups
45 minutes	5. Share codebooks	Plenary
90 minutes	6. Code transcripts	Individual students

### **Step 1. Upload transcripts**

*30 minutes*

In this self-guided step, students follow online tutorials in order to set up the software and upload transcripts.

### **Step 2. Learn how to develop a codebook**

*90 minutes*

Explain or remind students how different qualitative approaches are linked to analysis. Present or link to guidance on how to develop a codebook. (Remind the students that not all study designs use a codebook.)

### **Step 3. Learn how to manage coding/em>**

*3 hours*

Re-visit the introduction to qualitative software, with a focus on managing data and coding. Engage students in a plenary discussion.

### **Step 4. Develop a codebook**

*2 hours*

In their established small groups and using transcripts from the poster project, students:

- Identify broad deductive and inductive codes.
- Define each of these codes.
- From each broad code, identify and define sub-codes.

Together, they agree a set number of transcripts (two or three).

### **Step 5. Share codebooks**

*45 minutes*

Groups share their codebooks in person or on an online platform. Encourage peer learning and discussion.

### **Step 6. Code transcripts**

*90 minutes*

Individual students use their group's codebook to start coding transcripts.

## **Session 10. Qualitative Write Up and Data Visualisation | 3.5 hours**

To deepen students' analysis and support knowledge translation, this session models ways to convey qualitative analysis, through both writing and visuals. After preliminary coding in the previous session, students learn about ways to describe and

visualize data, skills they go on to practice in the project on [Posters: Applying Research Methods](#), to deepen analysis and support knowledge translation.

Introduce best practices in writing up qualitative analysis, including details that address the issues of trustworthiness and reliability. Provide examples of how themes and codes can be presented visually, both as part of the analysis process and for communicating results.

### Outcomes

By the end of this session, students can:

- Apply scientific writing skills to write up one theme and code.
- Address trustworthiness and reliability in their write-up.
- Describe different methods of data visualisation.
- Visually depict the relationship between codes and themes.

### Preparation

Develop a presentation to summarise principles and examples of write-ups and data visualisation (Step 1).

Collect examples from publications for students to discuss (Step 1).

### Steps

Time	Step	Who
1 hour	1. Present principles and examples	Facilitator
1 hour	2. Write up themes	Individual students
90 minutes	3. Develop visuals of codes	Groups

#### ***Step 1. Present principles and examples***

*1 hour*

Draw attention to key principles of writing up qualitative themes and different forms of data visualisation. Include examples from publications for PhD students to comment on and discuss during the session. Remind PhD students about reliability and trustworthiness and invite discussion on how to address these issues when writing up findings.

#### ***Step 2. Write up themes***

*1 hour*

Each student writes up one of their group's themes, including at least two codes within the theme in the form of a paragraph, and share their write up online. Each student comments on the write-up of at least one other member of same group.

After the session, you or a co-facilitator reviews all submissions. Post or share overall feedback in the form of a voice-note or written comments, noting strengths and areas to improve.

#### ***Step 3. Develop visuals of codes***

*90 minutes*

Each group develops a visual of their qualitative codes to be included in their project on [Posters: Applying Research Methods](#).

## Session 11. Case Studies | 90 minutes

A case study is a research approach that aims to gain an in-depth understanding of a complex, multi-faceted issue in its real-life context. It is one of the most widely used research designs in the field of public health. In this session, describe this qualitative research design and show how to apply it to address a public health issue. Outline the key concepts, the methods, the steps and the criteria to assess the quality of a case study as a research study.

## Outcomes

By the end of this session, students can:

- Describe key concepts (case, unit of analysis) of a case study design.
- Identify the individuals most responsible for developing this approach.
- Describe the different types of case study design (multiple, unique, embedded level of analysis).
- Formulate a research question for which a case study would be an appropriate design.
- Describe the process of conducting a case study (both the data collection methods and analysis).
- Assess critically the validity and the quality of a case study research.

## Preparation

Design a presentation using concrete examples of research studies to illustrate the key concepts of the case study as a qualitative research method (Step 1).

Instructional materials:

- Crowe, S., Cresswell, K., Robertson, A., Huby, G., Avery, A., Sheikh, A. (2011). [The case study approach](#). BMC Medical Research Methodology; 11:100.
- Ridde, V., Turcotte-Tremblay, A.M., Soares, A., et al (2014). [Protocol for the process evaluation of interventions combining performance-based financing with health equity in Burkina Faso](#). Implementation Science. 9:1-12
- Atkinson, S. (1998). [From vision to reality](#): implementing health reforms in Lusaka, Zambia. Journal of International Development. 4:631-639.

Additional reading:

- Flyvbjerg, B. (2006). [Five Misunderstandings About Case-Study Research](#). Qualitative inquiry, 12:219-245.
- Yin, R.K. (2013). [Validity and generalization in future case study](#) evaluations. Evaluation, 19.
- Yazan, B. (2015). [Three Approaches to Case Study Methods in Education](#): Yin, Merriam, and Stake. The Qualitative Report, 20:134-152.
- Rolfe, B., Leshabari, S., Rutta, F., Murray, S.F. (2008). [The crisis in human resources for health care and the potential of a 'retired' workforce](#): case study of the independent midwifery sector in Tanzania. Health Policy and Planning, 23:137-149.
- Powell, B.J., Proctor, E.K., Glisson, C.A., et al. (2013). [A mixed methods multiple case study of implementation as usual in children's social service organizations](#): study protocol. Implementation Science, 8:92.

## Steps

Time	Step	Who
As needed	1. Present key concepts and examples	Facilitator
As needed	2. Create a case study design	Individuals or groups

### **Step 1. Present key concepts and examples**

*As needed*

Invite students to share their own understandings, experiences and questions concerning the case study design, as you explain these elements:

- The definition of a case study design.
- The role of the main authors.
- The main principles and key concepts of the approach.
- Types of case study designs.
- The process of conducting a case study.
- Main pitfalls to avoid.
- Assessing case study research.

## **Step 2. Build a case study design**

*As needed*

In this practical exercise, students build a case study design. They:

- Formulate a research question.
- Define the case, the unit of analysis, the data collection methods and the data analysis plan.