Qualitative Methods

There are five types of qualitative methods that are most applicable to monitoring. These include: key informant interviews, focus group discussions, matrix ranking, direct observation, and mapping.

Before going into the details of these techniques, it is worth mentioning that a variety of qualitative social methods are sometimes arranged together and presented as a package known as Rapid Appraisal. Rapid Appraisal techniques are designed to encourage maximum community involvement and consultation in data collection, analysis, and use. They can be effectively used to help make informed and timely decisions regarding conservation and development projects.

Rapid Appraisal techniques are especially useful for assessing local site conditions (see chapter 3). Because these techniques can provide in-depth and extensive descriptive information, they can be used to develop a comprehensive depiction of local communities that allows you to design and implement appropriate projects. Generally, however, most Rapid Appraisal techniques are too descriptive and open-ended in nature to be used as the only tool for rigorous and long-term project monitoring efforts.

Key Informant Interview

What is it? Key informant interviewing is a form of interviewing in which only some of the questions are predetermined. Interviews are conducted one-on-one between the respondent and a fairly well-trained and highly skilled interviewer. Although you can develop a questionnaire to be followed by the interviewer, most often a topic guide, a list of topics to be covered in the key informant interview, is used in probing the respondent. Questions are generally open-ended, meaning that they leave space for the respondent to answer in different ways.

What are its advantages? A key informant interview is useful when you want to quickly gain some insight into a particular subject or you are collecting data on a highly complex subject matter and there are particularly knowledgeable respondents whom you can interview. It is also useful when you must collect data on a highly sensitive subject matter, when respondents are widely dispersed over a large area, or when peer pressure may influence a respondent's answer in a group.

What are its disadvantages? A major theoretical disadvantage of a key informant interview is that it can be very difficult to gauge the extent to which responses from a given individual represent the population as a whole. Analysis and comparison of the results is thus often difficult because a typical key informant interview produces respondent-specific data.
One practical disadvantage of the technique is that some responses may not be accurately recorded by the interviewer as there may be a large gap between the respondent's knowledge and that of the interviewer. In addition, the potential for providing supervisory feedback is limited as *debriefing* is time consuming. Finally, the interviewer often has little control over the setting in which the interview is conducted, so it is often difficult to avoid interruption.

*What does it cost?* Conducting a key informant interview is relatively inexpensive. You interview fewer respondents and thus the cost of employing this method will be substantially less than conducting a formal social survey.

*What other resources or special skills are needed?* Conducting a key informant interview properly requires a very high level of skill. If you intend to use this method, you must invest fully in adequate training and supervision of your monitoring team. Unlike formal
surveys where the interviewer merely fills in or checks off responses, key informant interviewing requires quick and creative thinking and the ability to understand and process the data provided by the informant. It is important that the interviewer be able to accurately receive data, accurately recall data, critically evaluate data, and act on the data as they are received in order to control and properly manage the interview.

**Focus Group Discussion**

*What is it?* A focus group discussion involves bringing together a group of people to talk about a specific topic. It takes advantage of group dynamics and allows respondents to be guided by a skilled moderator into increasing levels of depth on key issues included in the monitoring plan. Focus groups are ideally fairly homogenous groups of between six to eight participants.

Determining the number of focus groups you need to discuss a particular subject is dependent on a variety of issues. You should consider the following points when planning your monitoring:

* Conduct at least two focus groups for each subset of the population from which you want data (such as women of child-bearing age or rattan collectors).
* Conduct focus groups until the data obtained are not new.
* Conduct focus groups in each geographic region where you feel a meaningful difference exists.

The composition of the focus groups can be determined by such factors as:

* Socioeconomic class
* Type of resource user (such as resin collectors, fishermen, hunters)
* Level of expertise (such as familiarity with sustainable agriculture techniques, years hunting)
* Demographic data (such as age, marital status, or gender)
* Cultural or ethnic differences

The moderator conducts the focus group using a topic guide similar to the one described for key informant interviewing. The topic guide is an extremely important element of the focus group method. It serves as a summary statement of the issues and objectives to be covered in the focus group. Preparing the topic guide is an exercise that forces both the moderator and the project manager to organize their thoughts and to review the monitoring plan thoroughly. A loosely constructed topic guide generally means that
the subject has not been thought through in enough detail to get good results from the focus group sessions. The topic guide also serves as a road map and as a memory aid for the moderator. A good moderator will have the flexibility and skill to stay on course and to cover all of the objectives of the session and yet allow the discussion to flow naturally and spontaneously from respondents. The moderator will also pursue new issues raised by respondents if they are relevant to the topic.

![Image of a focus group session]

The moderator is assisted by an observer who watches the reactions and body language of the participants in the focus group. One of the main functions of the observer is to operate a tape recorder that records the entire focus group session. At the beginning of the focus group, the moderator explains the importance of accurately capturing what the respondents have to say and thus the use of the tape recorder. If any of the participants are unhappy with the use of the tape recorder, then it can be removed and the observer will have to take good and complete notes.

**What are its advantages?** A focus group provides the opportunity for group interaction which will generally stimulate richer responses and allow new and valuable thoughts to emerge. It also enables project managers to observe discussions and gain first-hand insights into the respondents' behaviors, attitudes, language, and feelings. Finally, it can be completed more quickly and generally less expensively than a series of key informant or formal social surveys.

**What are its disadvantages?** Conducting a truly effective and useful focus group requires a high level of skill. Managing the discussion group is rarely problem free. Often group dynamics will work against the moderator. Participants may be reluctant to speak out in public and for this reason you may not get much variation in the
response and input. Likewise, you may get a dull group which lacks interest in the subject matter. In addition to problems that occur across an entire group, there are often problems associated with individual respondents. Some of the most frequently encountered problematic participants in focus groups are dominating, shy, overly talkative, angry, disruptive, or questioning respondents.

In addition, from a practical perspective, analyzing focus data is a difficult and time-consuming task. As focus group sessions are
The composition of the monitoring team you select should reflect the diversity of the population where you will be working. For example, if your monitoring plan calls for collecting data in an area where there are indigenous people and migrants, then your monitoring team should be made up of members of both groups. As almost all monitoring of social data requires talking to women, it is critically important that your monitoring team include women. In most cases monitoring teams should be roughly equally divided between men and women. Monitoring team members must have at least some basic formal education—they will be expected to do a lot of writing while collecting and compiling data.

Characteristics of a good team member include that he or she is:

* **Patient.** Maintains his or her composure even when things are not going as planned.

* **Attentive.** Listens to a respondent without interrupting, judging, or lecturing.

* **Humble.** Is not class conscious and doesn’t put himself or herself above others.

* **Respectful.** Shows regard for community members and fellow team members.

* **Friendly.** Is easy to work with and gets along well with others.

* **Enthusiastic.** Is eager and animated.

* **Thorough.** Completes tasks as instructed.

* **Creative.** Is dynamic and shows flexibility in thinking.

* **Curious.** Shows genuine interest in what people have to say.

* **Strong.** Can handle difficult field work schedules, long hikes, and uncomfortable conditions.

* **Self-Motivated.** Takes the initiative to do needed tasks on his or her own.

A review of these characteristics may lead you to believe that monitoring team members need to be super-human. In fact, being a good monitoring team member is a very difficult task, as illustrated in the quote in the sidebar.