



## ADMINISTRACIÓN – GESTIÓN - CALIDAD

### Use of external interviewers in qualitative research: action plan

Uso de entrevistadores externos na pesquisa qualitativa: plano de ação

Uso de entrevistadores externos en la investigación cualitativa: plan de acción

**\*Gomes, Ingrid Meireles \*\*Lacerda, Maria Ribeiro \*\*\*Rodrigues, Jéssica  
Aline Pereira \*\*\*\*Nascimento, Jaqueline Dias do \*\*\*\*\*Camargo, Tatiana  
Braga de**

\*PhD student of the Graduate Program in Nursing of University Federal do Paraná (PPGENF/UFPR). Membro do NEPECHE/UFPR E-mail: [inguide@gmail.com](mailto:inguide@gmail.com) \*\*Phd in Nursing. Professor of PPGENF/UFPR. Coordinator of NEPECHE/UFPR. \*\*\*Master Student of PPGENF/UFPR. Nurse of STMO-HC/UFPR. Member of NEPECHE/UFPR \*\*\*\*Phd student of PPGENF/UFPR. Nurse Department of UFPR Nursing. Member of NEPECHE/UFPR \*\*\*\*\* PhD student of PPGENF/UFPR. Nurse of UTIA-HC/UFPR. Member of NEPECHE/UFPR. Brazil.

Keywords: Interview; Investigative Techniques; Qualitative Research; Research Personnel; Planning  
Palabras chave: Entrevista; Técnicas de Pesquisa; Pesquisa Qualitativa; Pesquisadores; Planejamento

Palabras clave: Entrevista; Técnicas de Investigación; Investigación Cualitativa; Investigadores; Planificación

### ABSTRACT

Qualitative research is growing, bringing with it the need to think of it as methodologically in order to avoid biases and ethical dilemmas. Therefore, it is necessary to reflect on its phases, among them the collection of data through interviews. The purpose is therefore to present a plan of action that guides the training and monitoring of external interviewers in conducting qualitative research. It describes the proposed action plan, which consists of five phases: feasibility; selection; negotiation; training; and monitoring. And in order to illustrate its practical use, it describes the experience of the authors with the use of the proposed action plan, the encountered facilities and difficulties. It is concluded that to employ an external person to perform data collection in qualitative research it is a facilitator, although it represents a challenge and requires dedication and *expertise* of the researcher. The need for greater financial incentives is also recognized to conduct this type of research as well as commitment of the researchers to seek sources of funding.

## RESUMO

A pesquisa qualitativa vem crescendo, trazendo consigo a necessidade de pensá-la metodologicamente, a fim de evitar vieses e dilemas éticos. Dessa forma, faz-se necessário refletir sobre suas etapas, dentre elas a coleta de dados por meio de entrevistas. Objetiva-se, portanto, apresentar um plano de ação que norteie a capacitação e acompanhamento de entrevistadores externos na realização da pesquisa qualitativa. Descreve-se o plano de ação proposto, que consta de cinco momentos: viabilidade; seleção; negociação; treinamento; e acompanhamento. E, a fim de exemplificar sua utilização prática, descreve-se a experiência das autoras com a utilização do plano de ação proposto, as facilidades e dificuldades encontradas. Conclui-se que empregar uma pessoa externa para realizar a coleta de dados em uma pesquisa qualitativa é um facilitador, embora represente um desafio e exija dedicação e *expertise* do pesquisador. Reconhece-se, ainda, a necessidade de maiores incentivos financeiros para a realização desse tipo de pesquisa, bem como comprometimento dos pesquisadores em buscar fontes de financiamento.

## RESUMEN

La investigación cualitativa está creciendo, trayendo consigo la necesidad de pensar en ella metodológicamente, con el fin de evitar sesgos y dilemas éticos. Por lo tanto, es necesario reflexionar acerca de sus etapas, entre ellas la recogida de datos a través de entrevistas. Se objetiva, por lo tanto, presentar un plan de acción que guíe la capacitación y supervisión de entrevistadores externos durante la realización de la investigación cualitativa. Se describe el plan de acción propuesto, que tiene cinco momentos: viabilidad; selección; negociación; entrenamiento, y supervisión. Y, con el fin de ilustrar su uso práctico, se describe la experiencia de las autoras con el uso del plan de acción propuesto, las facilidades y las dificultades encontradas. Se concluye que emplear una persona externa para llevar a cabo la recogida de datos en una investigación cualitativa es un facilitador, aunque represente un reto y requiera dedicación y pericia del investigador. También se reconoce la necesidad de mayores incentivos financieros para llevar a cabo este tipo de investigación, así como el compromiso de los investigadores para buscar fuentes de financiación.

## INTRODUCTION

Qualitative research diffuses progressively <sup>(1-3)</sup> and presents the possibility of seeking knowledge in relations between human beings. To this end, it uses the interpretation of reality experienced by individuals, and the understanding through speeches, as well as gestures, arts and other social symbols <sup>(1)</sup>. Especially in nursing, qualitative research acquires force as it enables complex, not linear, knowledge and subjective care <sup>(1)</sup>, the object and purpose of nursing.

Recognizing solely the growth of qualitative research in health is not enough. Further consideration and theoretical and methodological consistency applications are necessary <sup>(3)</sup>. It is essential to ponder the data collection techniques in this research format and theoretical reflection by the researchers on the techniques used is important to minimize even ethical problems from them <sup>(2)</sup>.

In this context, it is urgent to discuss about the interview technique, as it is one of the most frequently used for data collection <sup>(2)</sup>. The interview technique allows data to emerge from the reflection of the studied social phenomenon, by obtaining information arising from a dialogue interaction between researcher and subject.

This study itself emerged from an activity proposed in the research group "Centre for Studies and Research in Human Care Nursing" - NEPECHE, whose aim was to discuss the preparation and conducting interviews in qualitative research, especially within the methodology of Data Founded Theory (DFT). This activity was divided into three stages. First, we discussed the use of interviews in qualitative research. After

that, we held interviews on a specific DFT. Finally, on performing the qualitative research, we hired interview people for that part referred to in this study.

The research originating this study uses the support of external interviewers to collect data. An action plan operationalized this decision, in order to guide the realization of this partnership, and get the best and most reliable results in research developed. Thus, this paper aims to present an action plan to guide training and monitoring of external interviewers to assist in conducting qualitative research.

### **A person foreign to the research**

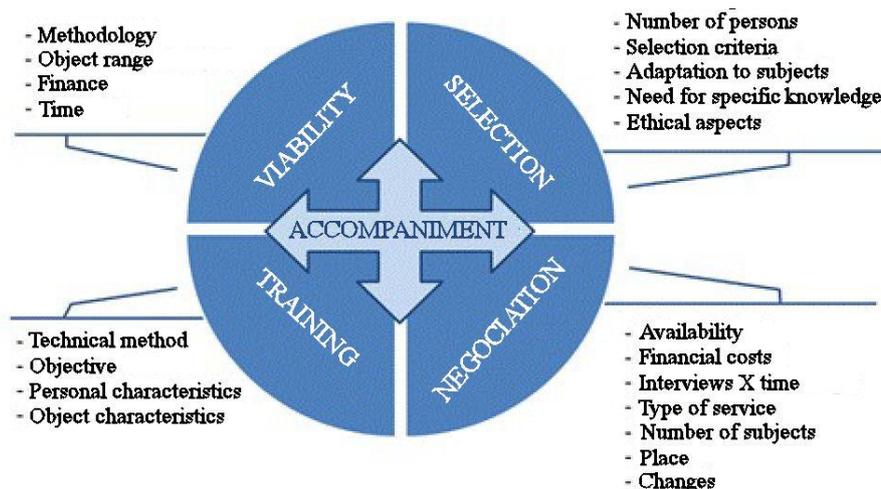
Conducting interviews and with them build and deepen knowledge are not simple tasks; nor does opting for qualitative interviews mean that the content will be apprehended, understood and reflected. Non-theoretical results can arise when we believe that the success of the interview relates exclusively to assertive choice of questions <sup>(3)</sup>.

It is necessary to go further, understand the research, its object and purpose, the context and the participants and prepare the data collection. Thus, one may think that entering a person who is not part of the research team to collect data is contradictory to the quality of results. It is, however, an alternative often necessary for the development of the for example in situations with a time constraint. To this end, the inclusion of person(s) must be meticulously thought out and planned. To facilitate this process we present an action plan consisting of 5 instances: viability; selection; negotiation; training and monitoring.

### **Action plan for inclusion of external interviewers in data collection**

We start by showing a figure with an overview of the action plan and its five instances (Figure 1). We will then pass to a brief explanation of each moment. It is worth mentioning that the figure proposed in this study passed the validation of experts within NEPECHE / UFPR. To facilitate understanding, the proposed elaborate action plan will contain examples from the experience of the authors.

**Figure 1** - Plan of Action for the inclusion of external interviewers for data collection



### First: Viability

We sought to evaluate the feasibility of conducting the collection of data by external interviewers under different aspects: financial, time availability, methodology and scope of the research objectives.

Including a person who is not part of the research to collect data, is a matter of cost and it is very important to consider whether there are and there will be sufficient resources for it. In the case of research underlying the presentation of this study, the experience became feasible through a research-funding agency. As this research uses the DFT as methodology, an assertive prediction on the number of participants and interviews is impossible<sup>(4)</sup>. Thus, to perform the analysis of financial viability, it was necessary to prepare a preliminary estimate of interviews, maintaining higher margins than expected. We had to be aware that exceeding this margin and the funds of financing running out, it would become necessary for the researchers to add resources, or collect the data themselves.

On the issue of time, we evaluated the availability to perform training and keep improving the person hired, favouring the proper collection, to obtain meaningful data. This task becomes relevant, since we know that development agencies sometimes set time limits for the results to be presented and require detailed schedule of activities, which hinders the development of some types of qualitative research to the satisfaction<sup>(3)</sup>. This can be easily seen using DFT, where collection and analysis occur simultaneously and therefore demand more time for its realization.

In the research we opted for the semi-structured interview, in accordance with the methodology; part is a preliminary script, which may change with each new interview, given the constant comparison and the circularity of the data proposed in DFT<sup>(4)</sup>. With this, the training and the link with the person selected to carry out the collection needs to be frequent and enlightening, so that the interviewer is prepared to get the data according to the needs of research and to deal with the changes in the collecting instrument and conduct research.

For any proposal to conduct a survey to be truly valid, it is necessary to assess whether the purpose enables the achievement of full formal objectives, without

underestimating the potential interference. Thus, it should be borne in mind which type of research for what ends and to whom the knowledge that the study intends to produce will serve, seeing social impact beyond the ethical commitment of nursing and qualitative research to society <sup>(1)</sup>.

## **Second: Selection**

Regarding the selection, we sought to establish the number of people required to conduct the service, the ethical aspects and the hiring professional selection criteria. Regarding the initial number of people, we chose for one only since the interviews cannot be performed concurrently, because as proposed by DFT, on every new interview is the data of this and all previous ones are analysed <sup>(4)</sup>.

To respect ethical aspects, we pondered different issues, as the anonymity of participants, the inclusion of the interviewer in the research environment and the link with these participants. In addition, we considered the interference of the interviewer in personal and emotional aspects of the participants, the commitment of the interviewer to obtain complex and subjective data and with the transcription of the material, its participation in the scientific publication of the research results. Finally, we considered the interviewer's ability to understand the proposal, object and purpose of the research.

All these issues have permeated the preparation of the interviewer selection criteria and the next moment of the action plan, negotiation, in which some of these issues dealt with legal aspects.

Thus, as the external interviewer selection criteria, it was proposed that it should be a person with knowledge of the studied theme, able to develop continuation in the interviews and link responses to succeeding questions. Preferably, we would choose for someone aware of the profile of the participants, but this aspect would be worked in training and therefore was not an exclusion criterion. As to knowledge of the study method, this was dismissed, since the person would receive specific training on how to proceed in his task.

We selected a person graduated in nursing, who provided administrative services at the site of research but still had time for this task after service so he had knowledge of the object of study, the participants and of scientific tasks. For the transcription of the collected data, this first person hired showed to not have time available for such a task; and thus we selected another person with enough time to make the transcripts briefly, and who also held knowledge in scientific methodology, because it was a student who attended two years of undergraduate research projects.

Initially the choice of the first interviewer seemed assertive. It was, however, not successful due to the bond already established between the participants and the interviewer that potentially influenced the talks, as well as difficulties in conducting the interview ahead to information collected. Thus, we sought to achieve new and virtual training with this interviewer, but the interviews continued without the desired depth, it was necessary to redo them.

We then sought a new interviewer. At this time the person selected as transcriber simultaneously started the interviewer activity. Then, after training, success was obtained in the interviews, while still requiring the feedback between researcher and

interviewer / transcriber to improve these. Thus, there is currently a single foreign person hired to carry out the data collection and transcription, what is happening to the satisfaction.

### **Third: Negotiating**

In this phase, a number of items have been agreed between the parties involved, such as availability, financial cost, and number of respondents vs. time, type of service contracted, number of participants, location and possible changes that would occur. To this end, the parties signed up a legal contract of service in order to achieve greater security in the employment relationship.

This employment contract was drawn up in three parts. The first dealt with the service, addressing the participants of the interviews (characterization, contact form and scheduling). It also dealt with rights and obligations of external interviewers (interview conducting, delivery and presentation of the informed consent form to be signed and understood by the participants, rules for transcription, deadlines, manipulation of information and communication between contractor and researcher, participation in training, confidentiality and place of the interviews). This part finally discussed rights and obligations of the researcher (initial contact with participants, training and further guidance for the interview improvement, deadlines, and payments).

The second part elaborated on the financial aspects, in which it set compensation values for each type of service, including when necessary displacement of the contracted and treated the origin of financial resources to fund the contract.

In the third and final part, criteria were established to deal with issues that were not present in the contract. The researcher responsible for the research, her study guide and the external interviewer hired legally signed the contract.

Some discussed and formalized aspects with the external interviewer stand out: the time was treated both in question of the availability of the contractor to perform scheduled tasks, as well as the variability of the duration of each participant's interview, as it is not a chronological time but an experienced and emotionally revived moment <sup>(5)</sup>.

Given that the main service provided is conducting and transcribing the interviews, the procedures for its operation need to be clear and accessible to different people, avoiding biases. Both services are important and deserve attention. The interview because it is the source of data and based the results. The transcript, showing the raw data, and its maintenance at the end of the research report possibly even boosting the readers to draw their own conclusions <sup>(6)</sup>, either or not in agreement with the researcher's proposal.

Although we often idealize a location free from noises and others <sup>(4)</sup> for an interview, in practice this is not always possible. It is true that a suitable environment is necessary, however, privacy is a variable concept across cultures and therefore the presence of other people may not be an impediment <sup>(2)</sup>. In the case of this study, because it is for parents of children in treatment, usually the child accompanies the interview, and the interviewer must face this fact. Thus, it fell to the researchers to prepare him to experience difficulties and facilities arising from the interview not only with the respondent.

Finally, in relation to the number of participants, the DFT does not predetermine one sample quantity, according to this reference called theoretical sampling. What is consistent with the fact that, in qualitative research, we do not seek statistical generalizations <sup>(2)</sup>. Thus, it was necessary to negotiate a number of participants with the contractor, which, according to the methodology, is subject to change, making impossible an exact number of interviews to be hired. The parties involved then agreed to plan this number during research, and - given the lack of time, and predictability of number of the participants - the contract could break the agreement. This decision should, however be announced as soon as possible, and if ever there were any interviews scheduled at the time of this decision, it must be held before the contract termination.

#### **Fourth: Training**

Conduct interview is a complex, sometimes even ambiguous task. It requires the interviewer's immersion in subjectivity, without, however, abandoning the objectivity necessary for scientific research <sup>(5)</sup>. Therefore, it is possible to recognize that this task depends on field experience <sup>(6)</sup>. Without this experience becomes indispensable proper training in order to environment the interviewer to academia focusing on the research object and the field where the interviews will be conducted.

Aware of this need, we set out for the action plan of the training, which took place with different approaches. First, there were previously scheduled meetings with hired interviewers, in which the subject, object, and objective of the research were explained, as well as the methodological approach that would complete the research, clarifying what would be the participation of external interviewer and his importance and limitations in the process.

It reinforced the importance of knowing the object, purpose and thesis proposal for recognition of collected data, its relevance, and the conduct of the interview. The knowledge of these three items enables the understanding of all that longs to the data, "forcing him to put up always listening to what is said, and reflect on speech, form and content, watching tone of voice, clarity, gestures that accompany or replace speech " <sup>(6: 925)</sup>.

Later, a more didactic audio-visual presentation worked on personal issues as behaviour, clothing, preparation and organization of the material used. as well as methodological issues, on what it is and how to conduct the interview and transcription, presentation of semi structured instrument, possibility of modifying this instrument after each interview, variability in the way of addressing the same subject, according to the level of understanding of participants and with the progress of the interview.

Moreover, we discussed the ethical aspects involved in research, the management of information, secrecy and confidentiality. The external interviewer was instructed to how to minimize its interference with data collection and transcribe faithfully the information, adding non-verbal comments. It is recognized that the participant can be influenced, especially emotional nature arising from the interview, to revive delicate or conflicting situations experienced <sup>(5)</sup>. Thus, this interviewer was oriented as to how to proceed in situations presenting the need for emotional support for the respondents. In reference service where participants in this study were selected there is the availability of psychological and psychiatric professional support.

## **Fifth: Monitoring**

This is not an isolated moment as it actually permeates the others being the mainstay for all times can occur satisfactorily, essential so that there is commitment from both sides towards the research.

This is a very important item, because, due to the emerging nature of qualitative research, it is up to the researcher to decision making on the directions of research mainly on the progress of data collection and analysis <sup>(2)</sup>; and that decision needs to be conscious and planned. For this, contact the researcher with the interviewer should be close in order to clarify issues and facilitate the emergence of new data to improve the collection.

In this understanding, monitoring happens with variable frequency, whenever one of the parties consider it necessary or after each interview. Monitoring takes place through telephone contact, free e-resources for exchange of online messages via phone, by *email* and personal meetings. The resource type used to carry out the monitoring is chosen by agreement between the parties and depending on whether or not to face meeting and the arising demands.

The main demands for communication were: update or clarification about the instrument, availability of communication for the scheduling of new interviews and information on scheduled interviews. Besides communication was necessary for data transmission, such as the interview, the transcript, the new script and payments; questions on how to treat a particular subject during the interview; best graphic form for transcription, general feedback of service, as well as the support that the contractor offered to the contracted.

The necessary adjustments that were carried out, facilitated by constant monitoring as can be exemplified by the exchange of the person hired already mentioned. During the research, new training was needed, on both the object and methodology, as well as on practical issues of how to use electronic resources for data transmission. Times and places that participants preferred for the interviews were adapted. The initially proposed hospital interview with the patient already had a procedure or scheduled visit, when it was realized that the same preferred the interview to be conducted at home. Note that the route to hit all the vertices until this experience had success was not an easy task, but with dedication and commitment of the parties involved it was possible to achieve the success of this proposal.

## **FINAL CONSIDERATIONS**

Given the reported experience, it is clear that the possibility of an external person to collect data for a qualitative is a challenge. Yet, it is possible and feasible and could help especially when there are time constraints. It is believed that the presentation of this action plan creates subsidies to support quality criteria and validity in qualitative research, and to facilitate the operationalization of the work, without, however, belittling the scientific research.

Implementation of this action plan requires the researcher's expertise, as it does sufficient knowledge and experience to guide the interviewer in data collection to achieve the necessary depth in qualitative research. What initially seemed to be easy, demanded work, time, dedication and commitment. However, it has become a

facilitator as the experience itself had allowed the personal and professional growth of both the researcher as the external interviewer; resulting still in time and labour savings.

Interview is complex, especially in qualitative research, not allowing fixed patterns. So, think of training a person for the a role, bearing in mind that making do is not enough and is certain to present contradictions and difficulties. However, it is a facilitative alternative, and researchers should explore it and improve it, making their work less costly physically and intellectually.

As to the financial burden, this research had publicly funded support. The use of financing, whether public or private, is a major drive in conducting research, as it allows greater freedom in choosing alternatives for spending that often the researchers themselves can not afford. Thus, it is necessary to have more incentives and greater commitment of researchers to seek sources of funding.

## REFERENCES

1. Lacerda MR; Labronici LM. Papel social e paradigmas da pesquisa qualitativa de enfermagem. Rev bras enferm [internet]. 2011 [citado 2015 jun 30]; 64(2): 359-64. Disponível em: <http://www.scielo.br/pdf/reben/v64n2/a22v64n2.pdf>
2. Guerriero ICZ. Síntese das reflexões da reunião sobre ética em pesquisa qualitativa em saúde, Guarujá, SP. Ciênc saúde coletiva [internet]. 2008 [citado 2015 set 23]; 13(2): 459-63. Disponível em: <http://www.scielosp.org/pdf/csc/v13n2/a21v13n2.pdf>
3. Gonçalves H, Menasche R. Pesquisando na interface: problemas e desafios a partir da pesquisa qualitativa em saúde. Interface comun saúde educ [internet]. 2014 [citado 2015 ago 17]; 18(50):449-56. Disponível em: <http://www.scielo.br/pdf/icse/v18n50/1807-5762-icse-1807-576220140263.pdf>
4. Strauss A, Corbin J. Pesquisa qualitativa: técnicas e procedimentos para o desenvolvimento de teoria fundamentada. 2. ed. Porto Alegre: Artmed, 2008.
5. Paula CC, Padoin SMM, Terra MG, Souza IEO, Cabral IE. Modos de condução da entrevista em pesquisa fenomenológica: relato de experiência. Rev bras enferm [internet]. 2014 [citado 2015 set 20]; 67(3):468-72. Disponível em: <http://www.scielo.br/pdf/reben/v67n3/0034-7167-reben-67-03-0468.pdf>
6. Hoffmann MV, Oliveira ICS. Entrevista não-diretiva: uma possibilidade de abordagem em grupo. Rev bras enferm [internet]. 2009 [citado 2015 ago 23]; 62(6): 923-7. Disponível em: <http://www.scielo.br/pdf/reben/v62n6/a21v62n6.pdf>

Received: October 21, 2015; Accepted: December 18, 2015

ISSN 1695-6141

© [COPYRIGHT](#) Servicio de Publicaciones - Universidad de Murcia