**PHASE 1
DEFINE**

Conducting
Immersive Research

Effort ● ● ● ● ●

Objective
To develop a research plan to help you generate a deep understanding of the problem with all its facets: structural, social, institutional, behavioral, cognitive, and emotional.

Note: When conducting any research, especially with human subjects, you may need to get prior approval from the institutional review board (IRB). Be sure to budget enough time for this process.

Time needed
Multiple days depending on size and scope

Participants
Design and research team, partners and stakeholders, individuals you are designing for

How to use this tool
Immersive research is designed to put you in the heart of the action, offering unique perspectives often missed from a distance. Use the resources within this package to help design your research, or supplement it with other approaches you have found useful.

1. **Identify research participants.** Define clear criteria for selecting research subjects.
2. **Plan research methods.** Choose methods aligned with your research goals.
3. **Assemble research team.** Form a team with relevant skills and cultural understanding.
4. **Create and submit public health practice program guidelines**: Develop and submit the research protocol to the local IRB.
5. **Refine and validate lines of inquiry.** Review and validate research questions with the local team.
6. **Train community collaborators in SBC qualitative research**. Provide research methods training to the team.
7. **Facilitate research methods.** Implement your research plan and methods.
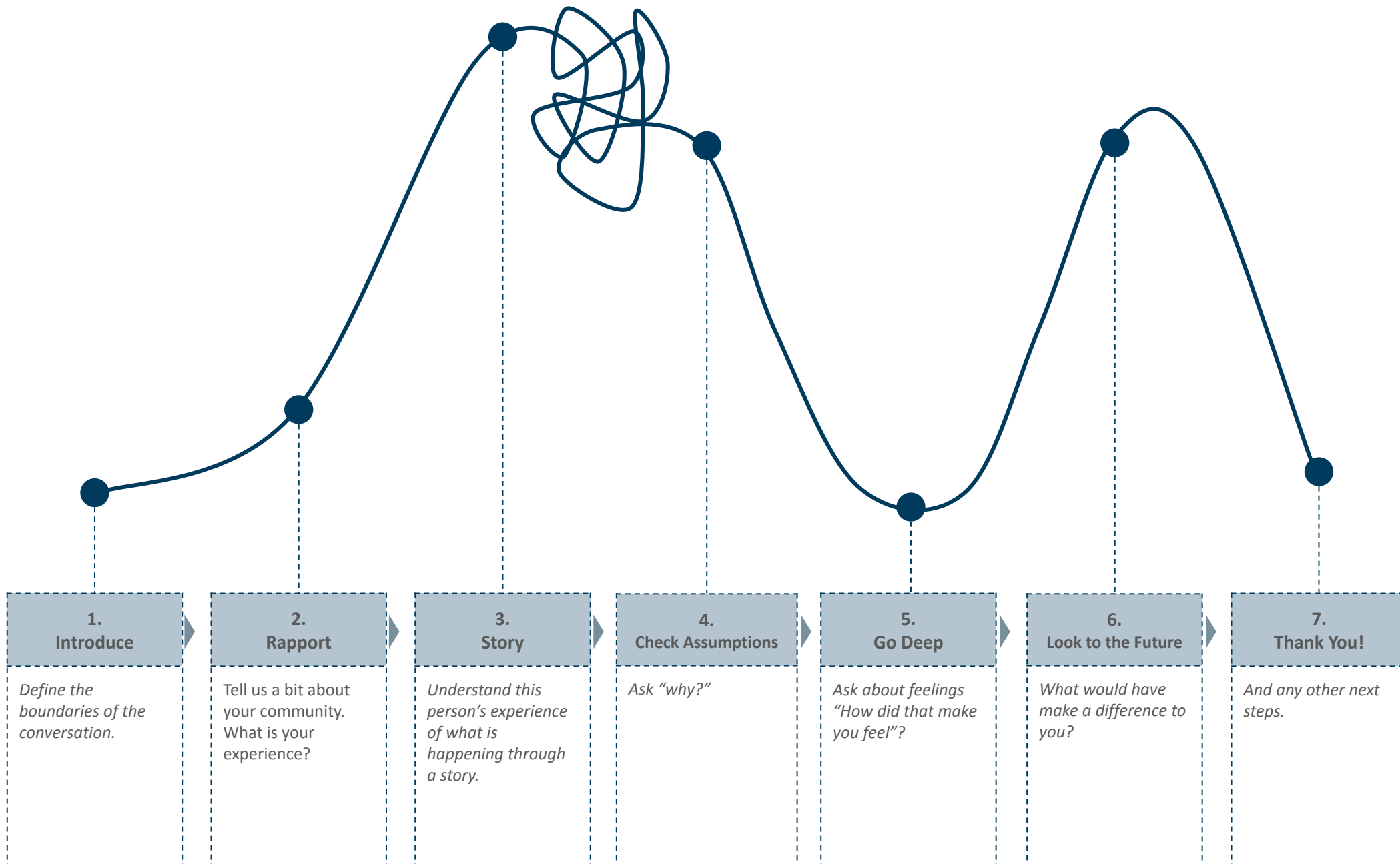
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Research Plan Checklist and Interview Process

☐ Define clear criteria for selecting research subjects.

☐ Choose research methods aligned with your research goals.

☐ Form research team.

☐ Develop consent form.

☐ Determine if your research needs approval from the IRB.

☐ Develop and submit research protocol to the local IRB.

☐ Refine and validate your lines of inquiry.

☐ Train researchers in SBC qualitative research.

I. **Introduction**
   A. Of yourselves.
   B. Of your organization.
   C. Of the research.

II. **Securing consent**
   A. Permission to record.
   B. Provide the participant with two consent forms and talk them through it.
   C. Give them time to review it and read it at their own pace, and ask them to sign it when they feel comfortable.
   D. Verbal consent can be given, if needed.

III. **Begin conversation**
   A. Start by making them feel comfortable: ask simple questions that have no effect on the research.
   B. Feel free to depart from the interview guide. Wherever the participant reacts emotionally or strongly, begin probing and asking further questions.
   C. Record quotes, anecdotes, and stories.
   D. Keep the conversation natural and flowing; avoid making it feel like a formal interview. The participant should feel like their experiences are valued and heard. The participant also should have more talk time than the researcher.

IV. **Closing the conversation**
   A. When you feel as though the conversation has reached a natural end, always:
      1. Thank them for their time.
      2. Ask them if they have any questions.

V. **Analysis and synthesis**
   A. Rapid analysis at the end of every interview between the research team (five minutes).
   B. End-of-week synthesis workshop.
   C. Group synthesis.

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In-depth Interviews

1. **Introduce**	2. **Rapport**	3. **Story**	4. **Check Assumptions**	5. **Go Deep**	6. **Look to the Future**	7. **Thank You!**
Define the boundaries of the conversation.	Tell us a bit about your community. What is your experience?	*Understand this person's experience of what is happening through a story.*	*Ask "why?"*	*Ask about feelings "How did that make you feel"?*	*What would have make a difference to you?*	*And any other next steps.*

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In-depth Interview Guide Template

PURPOSE

AUDIENCE

ELIGIBILITY CRITERIA

Note: The questions are meant to prompt and guide conversation (semi-structured) and are therefore **not written with the intent that they will all be asked in the way that they are written.** Remember that, with this type of research, we are looking for the right information. With that in mind, some of these questions will appear redundant or even irrelevant to our topic area, but the goal is to explore and discover the user's motivations, needs, attitudes, values, and more.

WHAT DO YOU WANT TO KNOW ABOUT?

THEME	
OBJECTIVE	

[ICE BREAKER]	QUESTION:	PROBES:
TOPIC:		● Tell us the story of how… ● Tell me about a time when…
TOPIC:	QUESTION:	PROBES:

THEME	
OBJECTIVE	

TOPIC:	QUESTION:	PROBES:
TOPIC:	QUESTION:	PROBES:

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Card Sort

How to use this tool

1. Make your deck of cards for the card sort; make as many cards as you need. Use either a word or a picture on each card, but whatever content you select, make sure it's easy to understand. Pictures are a better choice if the person doing the card sort speaks a different language or cannot read.

2. When tailoring your deck of cards to your precise research objectives, be sure that you're mixing concrete ideas with more abstract ones. You can learn a lot about how the person you're designing for understands the world by making this exercise more than just a simple ranking.

3. Now give the cards to the person you're designing for and ask her to sort them according to what's most important.

4. There are a couple variations on this method that work nicely: Instead of asking the person you're designing for to rank the cards in order of preference, ask her to arrange them as she sees fit. The results might surprise you. Another tweak is to pose different scenarios. Ask the person you're designing for how she would sort the cards if she had more money, if she were old, if she lived in a big city.

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Guided Tour

How to use this tool

A guided tour creates a structured introduction to a physical space, be it a person's home, workplace, or health facility, or a "tour" of something they use, such as the belongings in their bag.

1. **Make a plan.** Identify the different locations you would like to observe. Determine what you would like to know and arrange with the individual(s) for them to take you on a tour. You may want to travel with two people. One to ask questions, and one to take notes. Observe what is around you.

2. **Prepare participants.** Remember, you are entering into someone's personal life. Tread lightly and be respectful. Before you enter into their space, be sure you have full permission to be there. Let them know why you are doing the research and do not take photos unless the participants sign a consent form.

3. **Take a backseat.** Let the participant show you their space. Allow them to talk through it before you dive in with all your questions. Observe what is around you. What are the different practices and rituals within the home? How do family members interact?

4. **Ask a lot of questions.** You can even ask someone to demonstrate something for you or give them a scenario to respond to. For example, what is the first thing you do when you come home from the market?

5. **Focus on what is important!**

NOTES:

Citations

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