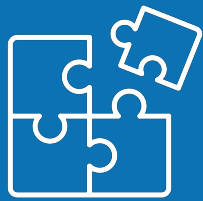
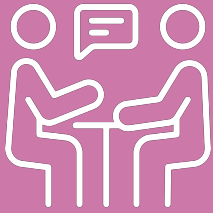




# Qualitative Insight Toolkit

**A practical guide to capturing conversations  
and turning them into insights**



*Qualitative Insight Team  
Public Health  
Wirral Council  
August 2024*

# Acknowledgments

The Qualitative Insight Team would like to thank Public Health, Wirral Council and community, voluntary and faith sector organisations who have supported the development of this toolkit.

Special thanks to One Wirral CIC, Wirral Multicultural Organisation, Make It Happen Birkenhead CIC, Wirral Ways (Change, Grow, Live) and Wirral Change for their participation in our Qualitative Insight Toolkit pilot. Your insight and ideas contributed to the development of this toolkit.

## How to reference this toolkit

If you are referring to this toolkit in your work, the following reference can be used:

Qualitative Insight Team (2024) *Qualitative Insight Toolkit: A practical guide to capturing conversations and turning them into insights*. Wirral: Wirral Council. Available at: <https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/>

If you require a reference to this toolkit in any other format, please contact [qualitativeinsightteam@wirral.gov.uk](mailto:qualitativeinsightteam@wirral.gov.uk).

# **Introduction**

## **What is the Qualitative Insight Toolkit?**

The Qualitative Insight Toolkit is a practical guide that can be used to support and enhance your engagement with communities. This Toolkit provides examples of best practice for gathering qualitative insights as well as practical resources you can use.

## **What is qualitative insight?**

Qualitative insight is about getting people to describe their experiences, opinions, and motivations in their own way. These insights are gathered using conversation and observation. Qualitative insight answers the “how?” and “why?”, rather than “how many?”.

## **Who created the Toolkit?**

This Toolkit was produced by the Qualitative Insight Team in Public Health, Wirral Council. The team’s role is to listen to residents to gather their thoughts and experiences to ensure their voices are heard which informs Council policy and decision making.

## **Why was the Toolkit produced?**

The Toolkit was developed to encourage and support insight gathering and sharing in Wirral. This will help the delivery of [Wirral’s Health and Wellbeing Strategy](#)<sup>1</sup>, ensuring the voices of residents are being used to make better decisions to address resident’s health and wellbeing needs. Everyone can play a role in gathering qualitative insights.

## **Who is the Toolkit designed for?**

The Toolkit is designed for those who want to learn more about the planning and practicalities of qualitative insight gathering. No previous experience is required.

## **How can this Toolkit benefit me?**

You may already gather qualitative insights as part of your everyday work, whether it be a casual chat over a cup of tea or a formal evaluation of an activity. The Toolkit is designed to enhance your qualitative insight knowledge and skills, so that you can gather and share insights in consistent and structured ways. The insights you gather could benefit you to evidence people’s needs or showcase the impact of your work.

## **Who do I contact for more information?**

For more information about this Toolkit or the team that developed it, please contact the Qualitative Insight Team at Wirral Council by email: [qualitativeinsightteam@wirral.gov.uk](mailto:qualitativeinsightteam@wirral.gov.uk)

<sup>1</sup> <https://democracy.wirral.gov.uk/documents/s50094349/Enc.%20%20for%20Health%20and%20Wellbeing%20Strategy.pdf>

# Toolkit Contents

This toolkit consists of five sections that guide you through the process of gathering qualitative insight from start to finish. An appendices sits alongside this Toolkit, containing templates and guidance for you to use when gathering your own insight.

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# PLANNING YOUR APPROACH

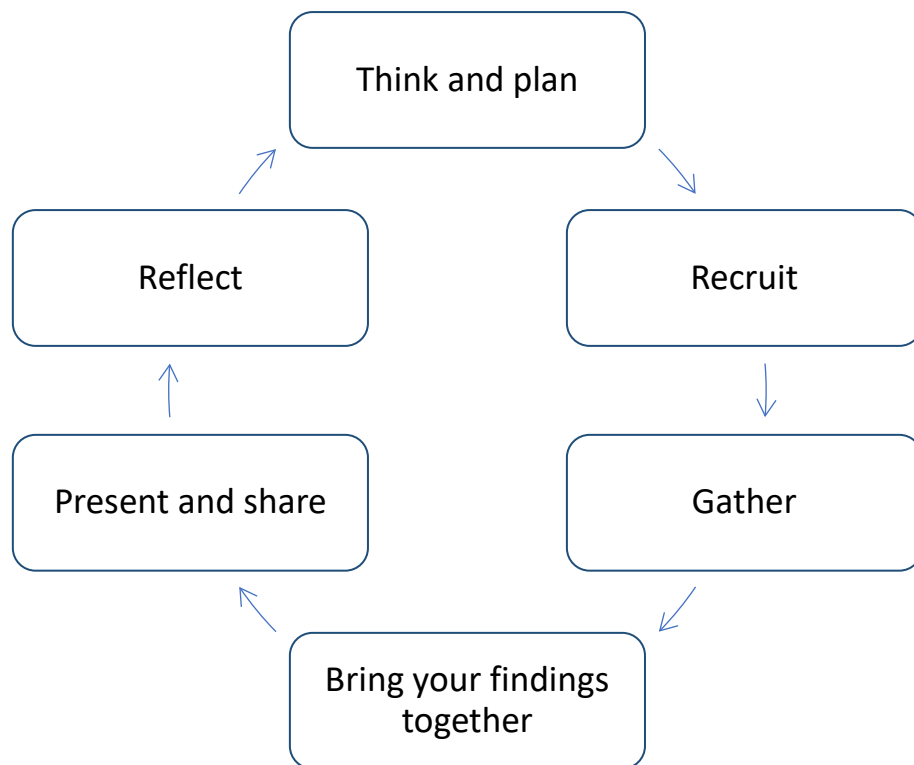
This is the first of five sections of the Qualitative Insight Toolkit.

Qualitative insight is information gathered from people that describes their experiences, opinions, and motivations. This insight can be used to help us understand people's behaviour and influence decision making to better suit the needs of people and communities.

This section helps you to think about the different stages of your approach to capturing qualitative insight. This can help you to identify strengths you have and challenges you may need to consider before starting your work.

## Section 1: Planning your approach

Before you start to gather insight, it is useful to think about the different stages of your work in advance. This will help you to establish your goals and make decisions that are guided by them. It may be helpful to think of qualitative insight gathering as a cycle:

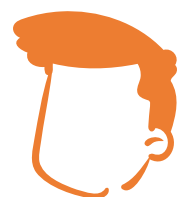


### Qualitative Insight Plan

The Qualitative Insight Plan shown on the next page provides suggested questions and prompts you can ask yourself to guide your planning. This can help to identify strengths you and your team have and challenges you may need to consider before starting your work.



As you start to gather qualitative insight, it can be tempting to take on more than you planned. Keep referring to your plan to stay on track with your goals.



### 1. What do I already know about this topic or community?

- What do I already know?
- Where has this information come from?
- What insight have others gathered?
- Have I thought about my own bias?

### 2. What do I want to find out?

- What are my broad questions?  
*E.g., Why do people access my organisation?*
- What gaps could my insight fill?

### 3. What capacity do I have?

- What are my timelines? Will I gather insight as part of my everyday work, or dedicate additional time?
- Do I have the resources and training needed?

### 4. Who will I engage with?

- Who might have experience or views on my topic?
- Am I overlooking anyone?
- How can I access the people I need?

### 5. How will I gather my insights?

- Where will I gather insights?
- What methods will I use?
- What questions will I ask?
- How will I gather the insights?

### 6. What potential risks could occur?

- What risks can I identify within my planning?
- How could I reduce risks from occurring?
- What will I do to keep myself and my participants safe?
- What will I do to ensure my participant's data is stored safely and securely?

### 7. How will I bring my findings together?

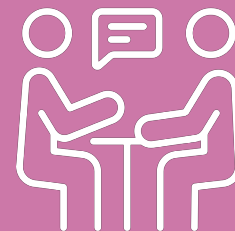
- What time do I have to bring my findings together?
- Themes are the common topics people talk about. How will I identify themes within my insight?
- Who can support me to review my gathered insights?

### 8. What will I do with my insights?

- How will I present my insights?
- Who will I share my insights with?
- What information will I share about my participants?
- How will I measure the impact of my work?

For a blank version of this Qualitative Insight Plan that you can use to respond to the questions above, see Appendix 1 in our 'Section 1 Templates: Planning Your Approach' document here:

<https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/>



## GATHERING QUALITATIVE INSIGHT

This is the second of five sections of the Qualitative Insight Toolkit.

Qualitative insight is information gathered from people that describes their experiences, opinions, and motivations. This insight can be used to help us understand people's behaviour and influence decision making to better suit the needs of people and communities.

This section provides an overview of best practice in gathering qualitative insight.



## Section 2: Gathering qualitative insight

This section provides an overview of best practice in gathering qualitative insight. It covers the practicalities of recruitment, choosing how you will collect data – your methods, capturing qualitative insights itself, asking questions, and gathering participant consent. This guidance will support you to think as a researcher so you can gather quality insights. Depending on your goals, you may not need to consider all the stages below.

### Recruitment

Recruitment is about finding potential people to talk to. You may already know people who'll be willing to talk, but you might want to reach people who aren't likely to volunteer. Recruitment options could include:

- Asking the people who use services if they'd like to share their views
- Seeking the help of local organisations who support your target audience
- Attending events where your target audience will be
- Advertising via posters, emails, or social media in places your target audience access



Recruitment doesn't have to be completed before you start talking to people. You can ask participants if they know other suitable people and snowball from there.



### **Sampling**

Sampling means selecting a group of participants who'll be able to share a range of experiences on your topic. This contrasts with speaking to people who all share the same experience because of their similar characteristics or lifestyles. Ways you could diversify your sample include:

- Speaking to people who live in different geographical areas
- If reviewing activities or services, consider people who access on different days/times, or those who don't access them at all
- If you have a list of potential participants, randomly select participants to reduce bias

### **Making your work accessible**

Some people may need support to take part because of their physical or mental health, care responsibilities, the cost of travel, accessibility issues, etc. Having a conversation with your participant beforehand is key to understanding how you can adapt to their needs. Examples include:

- Meeting people where and when they feel comfortable
- Ensuring suitable access to buildings, rooms, and toilets
- Adapting the format and language of your recruitment materials
- Subsidising travel costs

## Incentives

Incentives can be used to encourage participation, especially for those who are typically underrepresented. Incentives can be monetary (for example, vouchers) or in-kind (for example, food, volunteering opportunities, learning courses, or facilities). For information on ethical considerations around incentives, see the [UK Statistics Authority](#)<sup>2</sup>, or see [NHS England](#)<sup>3</sup> for more guidance on engaging with ‘underrepresented groups’ in health research.

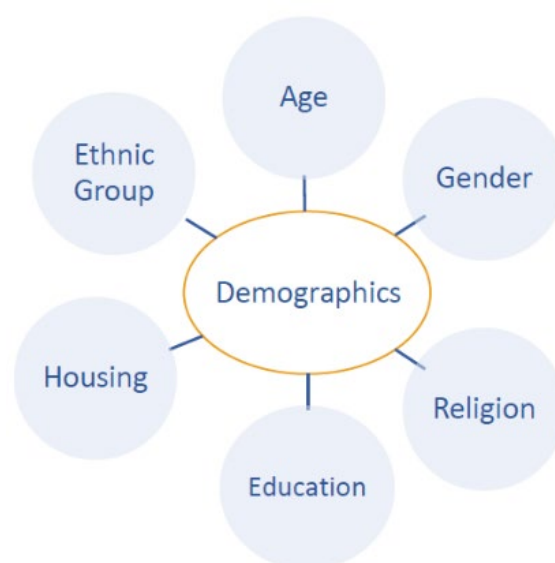
## Recruitment resources

When creating recruitment resources, consider what information you’ll share, such as the purpose of your work, eligibility criteria, what’s involved, dates/time/location, confidentiality, benefits of taking part, and what you’ll do with their information.

## Collecting participant demographics

You might want to collect participant demographics to know the characteristics of the people you’re engaging with. It can help you to diversify your sample or compare different people’s experiences. However, be careful not to generalise.

It's good practice to only capture relevant demographics. For example, if you’re asking people about how they access sexual health services you might want to know their sexual orientation rather than their housing situation.



For more information about demographic questions and answers, including examples and links to resources, see Appendix 2 in our ‘*Section 2 Templates: Gathering Qualitative Insight*’ document here:

<https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/>

<sup>2</sup> [https://uksa.statisticsauthority.gov.uk/publication/ethical-considerations-associated-with-qualitative-research-methods/pages/5/#lg\\_reimbursements-and-incentives](https://uksa.statisticsauthority.gov.uk/publication/ethical-considerations-associated-with-qualitative-research-methods/pages/5/#lg_reimbursements-and-incentives)

<sup>3</sup> <https://www.england.nhs.uk/aac/wp-content/uploads/sites/50/2023/02/B1905-increasing-diversity-in-research-participation-v2.pdf.pdf>

## Choosing how to collect insights: Methods

The method(s) you choose will depend on the insights you want to gather, who you'll be speaking to, and the outputs you want to create. It helps to work backwards, thinking of what your end goals are. The table below shows the methods the Qualitative Insight Team like to use and why. It also offers suggestions for resources and outputs.

Method	Casual conversations	Semi-structured depth conversations	Friendship depth conversations	Focus group	Observation
Description	Get to know someone to give you a flavour of their views or experiences. The key is having the confidence to introduce yourself.	A one-to-one conversation. Prepare questions to guide the conversation but have the freedom to follow the respondent's story.	Speak to 2 or 3 people together. Usually works best if the participants are trusted friends or family.	A group conversation guided by you (4 to 8 participants works well). You may incorporate activities like brainstorming.	Observe people's interactions, body language, speech, possessions, etc. Observe from afar, or while taking part in the group or activity.
Pros	<ul style="list-style-type: none"> <li>• Can be done anywhere</li> <li>• Light touch</li> </ul>	<ul style="list-style-type: none"> <li>• Build report</li> <li>• Capture people's stories in detail and in their own words</li> <li>• Give people time to open up</li> </ul>	<ul style="list-style-type: none"> <li>• Ease discomfort</li> <li>• Explore similarities and differences</li> <li>• Empower your participants</li> </ul>	<ul style="list-style-type: none"> <li>• Capture diverse perspectives</li> <li>• Easy to replicate</li> </ul>	<ul style="list-style-type: none"> <li>• Get an insider's perspective</li> <li>• See what people do, not just what they say they do</li> </ul>
Cons	<ul style="list-style-type: none"> <li>• Limited detail</li> </ul>	<ul style="list-style-type: none"> <li>• Time consuming</li> </ul>	<ul style="list-style-type: none"> <li>• Quality depends on the dynamic between participants</li> </ul>	<ul style="list-style-type: none"> <li>• Some voices may overpower others</li> <li>• Hard to get honesty on sensitive topics</li> </ul>	<ul style="list-style-type: none"> <li>• Difficulties accessing communities/events</li> <li>• Relies on your interpretation</li> </ul>
Resources	<ul style="list-style-type: none"> <li>• Notepad</li> <li>• Post-it notes</li> <li>• Insight grid</li> </ul>	<ul style="list-style-type: none"> <li>• Topic guide</li> <li>• Audio recorder</li> <li>• Notepad</li> </ul>	<ul style="list-style-type: none"> <li>• Topic guide</li> <li>• Audio recorder</li> <li>• Notepad</li> </ul>	<ul style="list-style-type: none"> <li>• Schedule</li> <li>• Audio/video recorder</li> <li>• Flipchart paper</li> <li>• Post-it notes</li> <li>• Online or in person</li> </ul>	<ul style="list-style-type: none"> <li>• Use your senses</li> <li>• A journal</li> </ul>
Example Outputs	<ul style="list-style-type: none"> <li>• Quotes</li> </ul>	<ul style="list-style-type: none"> <li>• Case studies</li> <li>• Journey map</li> </ul>	<ul style="list-style-type: none"> <li>• Case studies</li> </ul>	<ul style="list-style-type: none"> <li>• Visuals (brainstorm, post-it wall, etc.)</li> <li>• Word cloud</li> <li>• Report</li> </ul>	<ul style="list-style-type: none"> <li>• Notes and doodles</li> <li>• Provide context to reporting</li> </ul>

## Insight capture tools

Capturing the insights you are gathering is important, so that you can draw out themes and present your insights later on. Relying on your memory is risky, so consider using the tools below. For transparency, let people know how you are recording their information and get their consent where needed (information on gathering consent can be found under 'Consent and Anonymity' in this toolkit section).

### **Notepad and pen**



- Always handy for writing key quotes, observations, and prompts.
- However, using a notebook to transcribe word for word will distract your attention.

### **Post-it notes\***



- Concise.
- Easy to rearrange.
- Show your respondent you've picked up on the key points.
- Good for mapping processes or journeys.

### **Audio or video recording**



- An accurate account of what people said.
- Observe body language and group dynamics.
- Consider that recording can be off putting and that signed consent is needed.

\*See [Anatomy of a Good Sticky Note](#)<sup>4</sup> for more advice on using post-it notes.

### **Insight grids**



Insight grids can help you organise your notes in line with your questions or themes, giving you a head start when it comes to bringing your findings together. They help towards achieving consistency when capturing insights.

The idea is to set out the information you want to collect and leave blank space for your notes. You could include engagement details (time, place, date), participant demographics, and your questions/themes and prompts.

The benefit of insight grids is that the depth of conversation can be flexible. You can also make the grids anonymous to encourage open and honest conversation.

See Appendix 3 in our 'Gathering Qualitative Insight' templates document for examples of how you can structure your insight grids. This includes blank templates that you can print out and use and examples of insight grids being used in practice:

<https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/>



At the end of a focus group, try handing out blank paper for people to write anonymous comments. This works well to engage the quieter ones in the group, or for sensitive topics.



<sup>4</sup><https://userresearch.blog.gov.uk/2014/10/29/anatomy-of-a-good-sticky-note/>

## Creative ways of capturing insight

Consider using creative tools that get your participants involved in capturing their experiences, thoughts, and feelings. See suggestions below or visit [New Philanthropy Capital](#)<sup>5</sup> for more creative methods.



### Brainstorming

- Interactive
- Gather different perspectives
- Creates a visual of the conversation



### Graffiti walls

- A blank canvas for feedback
- Provides some anonymity



### Drawing

- Encourage self-expression
- Make engagements and outputs interesting



### Photographs

- A window into someone's life
- Elicit emotions and memories

Age...

My occupation is...

In my spare time I...

ABOUT YOU

Name: [ ]

I live in...

I live with...

My health and wellbeing...

### Activity sheets

Activity sheets can be designed in advance to help facilitate your conversations. They provide prompts for discussion and can help break down a conversation into manageable parts. Having an activity and visuals to work through together can help put people at ease. Activity sheets are a useful way of collecting insights consistently, making it easier to compare your insights later on.

To see examples of activity sheets that you can use to gather qualitative insight or adapt to suit your needs, see Appendix 4 in our '*Section 2 Templates: Gathering Qualitative Insight*' document here:

<https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/>



Remember that you don't have to be working on a project to capture insights. Think about ways you could build insight gathering into your day-to-day work. For example, you could create a **template for positive client quotes**, or a **shared folder for stand-out stories** you could use for case studies.

<sup>5</sup> <https://www.thinknpc.org/resource-hub/the-cycle-of-good-impact-practice-creative-methods/>

## The art of asking questions

The way you phrase a question shapes the response you get. Other factors like your body language, attention, and empathy can determine how comfortable participants feel sharing their experiences with you.

Below, the QIT has put together advice for making the most out of your conversations, as well as guidance on open, closed, and leading questions.



- Get to know your participants first.
- Be open minded and curious.
- Listen carefully and look interested.
- Give people time to think and respond. You don't always need to fill the silence.
- Be prepared to adapt your questions based on what you're hearing.
- Pay attention to non-verbal cues like posture, gestures, eye contact, and facial expressions. These can say more than words.
- Try to be relatable – e.g., consider the clothes you wear and the language you use.
- Avoid leading questions.



## Open and closed questions

Open-ended questions are designed to get people talking about their experiences and feelings in detail. They often start with “How?”, “What?”, “Tell me...”. On the other hand, closed questions require short answers, like yes/no, agree/disagree, or a number.

Below are examples of how closed questions can be turned into open questions:

### Closed Questions

- Do you like your town?
- How many times have you had counselling?
- Would you use our service again?

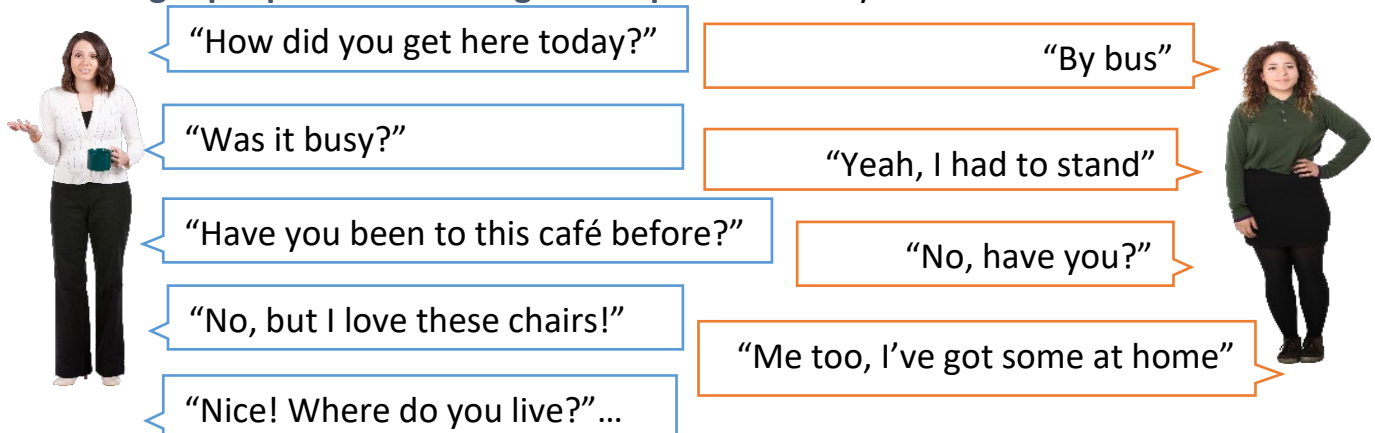


### Open Questions

- What's it like living in your town?
- Can you tell me about any counselling you've had?
- What would make you consider using our service again?

Although closed questions don't get detailed answers, they do have a place in conversations. They can be used:

1. To **get people used to being asked questions** early in the conversation:



2. To **probe or to clarify** previous responses:

- “How old were you when that happened?”
- “Have you always felt that way?”

3. To **paraphrase** (echo back) what the participant has said to confirm your understanding:

- “Did I understand you when you said...”
- “Did I hear you say that...”

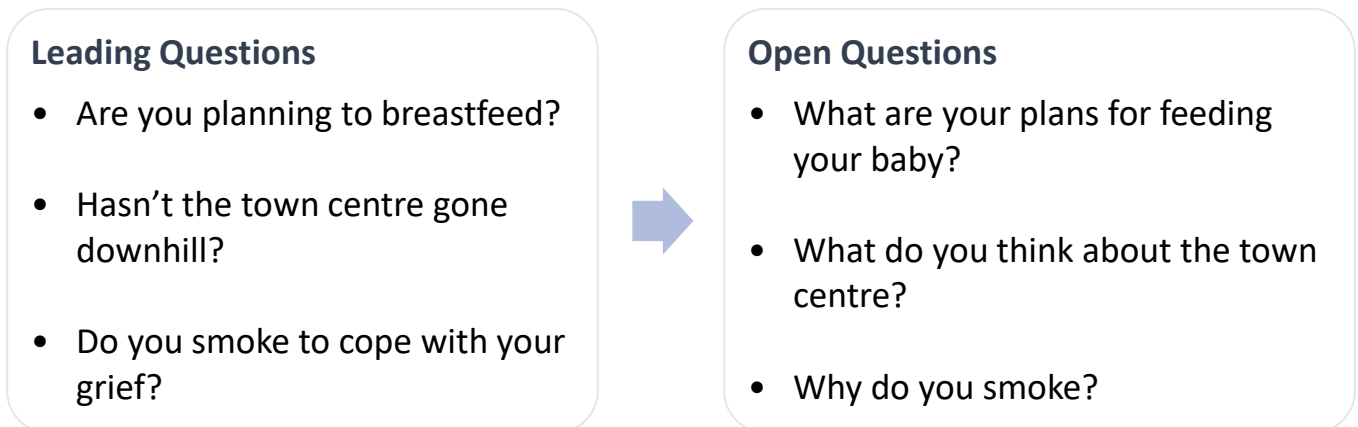
When used together, open and closed questions create a natural flowing conversation where you can explore people's views and focus in on the relevant details.

## Leading questions

Make sure you're not leading people to answer a certain way. You could be doing this by:

- Implying there's a correct answer
- Pressing your opinions on people
- Assuming how people act, think or feel and the reasons why

Avoid using leading questions when starting a discussion so that you open up the floor for a range of possible answers. See below for examples of turning leading questions into open questions:



For more tips on avoiding bias in question design, see [Healthwatch's<sup>6</sup>](#) guide.

The key takeaway is to be thoughtful when phrasing your questions. Try to listen out for yourself asking leading or closed questions. Asking open ended questions takes practice!

## Recognising difference in communication

The people you speak to may communicate in different ways depending on their background, communication style and/or communication needs.

Examples of differences that might impact on how participants engage with you could relate to: language and translation needs, body language, levels of literacy and understanding, learning difficulties, learning disabilities and physical disabilities, neurodiversity, or sight and hearing impairment.

Consider adapting your questions and approach to suit the communication needs of your participants. You could ask what your participant's communication needs are before they share their experiences with you, so they can fully take part in your work. This can also help participants to feel respected and valued for their contribution.

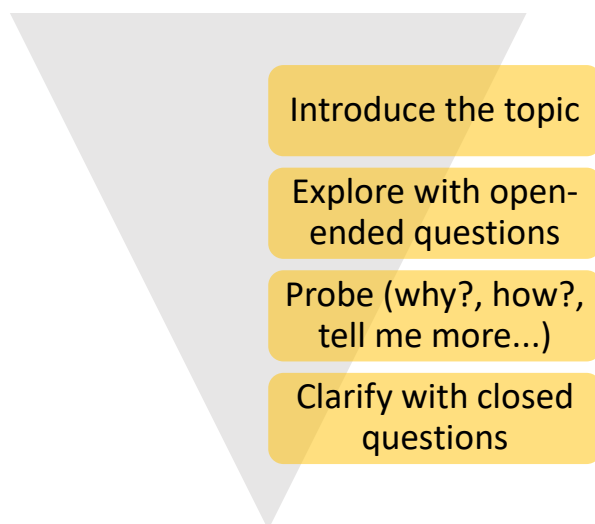
<sup>6</sup> [https://network.healthwatch.co.uk/sites/network.healthwatch.co.uk/files/20191101\\_Managing%20Bias%20Resource%20guidance%20formatted\\_0.pdf](https://network.healthwatch.co.uk/sites/network.healthwatch.co.uk/files/20191101_Managing%20Bias%20Resource%20guidance%20formatted_0.pdf)



## Preparing your questions

### Topic guide

You may find it helpful to plan a topic guide in advance of your engagement. A topic guide outlines the key topics and questions you want to discuss, helping to keep the conversation aligned to your goals. The level of detail included is up to you. If you are new to asking questions, you might be more comfortable holding a structured guide with main questions and prompts. Consider using a **funnel approach** when structuring your conversations:



For a focus group topic guide, you could include timings and the resources you need, for example:

Timing	Topic	Prompts	Resources
15 mins	Objectives	<ul style="list-style-type: none"><li>Explore the group's experiences of attending Eurovision as people who use wheelchairs.</li></ul>	Information sheet
	Ground rules and consent	<ul style="list-style-type: none"><li>Mutual respect</li><li>Audio recording</li></ul>	Consent form
	Introductions	<ul style="list-style-type: none"><li>Ice breaker</li></ul>	Name labels
15 mins	Accessibility: enablers and barriers	<ul style="list-style-type: none"><li>How was your experience of attending Eurovision?<ul style="list-style-type: none"><li>Transport, seating, toilets...</li></ul></li></ul>	Flip Chart Pens
10 mins- Break			
15 mins	Ideas brainstorm	<ul style="list-style-type: none"><li>What could make Eurovision more accessible in the future?</li></ul>	Flip Chart Pens

## Signposting to support

The questions you ask may prompt conversations where you will need to signpost or refer people to support opportunities. It's a good idea to prepare relevant signposting in advance, in case these situations occur. Great resources for signposting are [Wirral InfoBank](#) and [Family Toolbox](#)<sup>7</sup>. These are directories of services, community groups, and activities in Wirral that support health and wellbeing. The Family Toolbox provides signposting specific to families.

## Gathering participant consent

### **Informed consent**

If you need to capture conversations in more formal ways, such as audio and video recording, whereby participant's personal details are shared with you and stored by you, you should consider gaining their informed consent. Consent may not be required if you're capturing anonymous feedback.

Informed consent is about making your participants fully aware of what it means to take part. They can then decide what they would like to do. You can ask for their consent to gather, process, report and store the information they've provided. You can also confirm what information participants would like to be shared about them in your reporting, such as their name, age and any other identifying information.

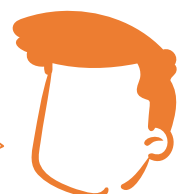
When asking for consent, it is good practice to get written consent. The Qualitative Insight Team has designed a consent form template with suggested questions and space for you to add your own. Additional guidance is also provided to support you to use consent forms in your work, where appropriate.

See Appendix 5 for consent form guidance and Appendix 6 for a blank consent form template in our '*Section 2 Templates: Gathering Qualitative Insight*' document here:

<https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/>



The Qualitative Insight Team recommend that consent forms are signed at the end of the engagement. This way, your participants know what their contribution has been before signing.



For frequently asked questions about consent, see [UK Research and Innovation](#)<sup>8</sup>.

<sup>7</sup> <https://www.wirralinfobank.co.uk> and <https://familytoolbox.co.uk/>

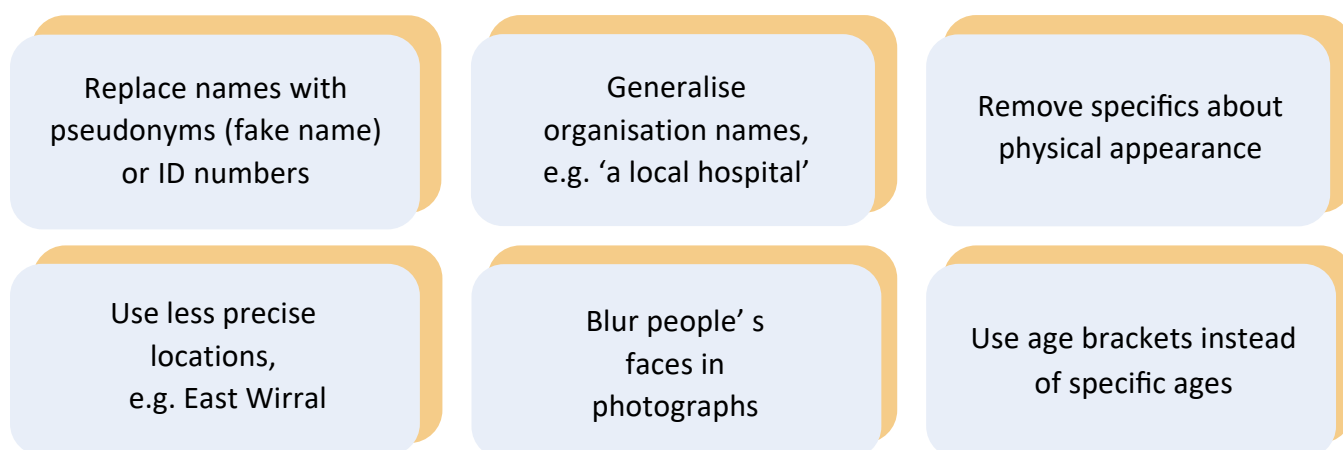
<sup>8</sup> <https://www.ukri.org/councils/esrc/guidance-for-applicants/research-ethics-guidance/consent/>

## Sharing information about your participants

It is important that your participants understand what information will be shared about them in your work. Providing a clear explanation of what identifying information you will share about your participants in your work can help them feel confident to share their experiences with you.

Removing information about participants that might identify them to others is known as anonymisation. This aims to reduce the chances of your participants being recognised in your work when they do not want to be identified.

See below for examples of how you could change identifying information:



Choose an appropriate pseudonym by considering the age, culture, religion, etc., of your participant, or empower them to choose their own pseudonym.



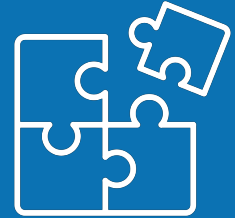
It's good practice to anonymise your insights as soon as possible after gathering. If personal identifiers do need to be stored, they should be stored securely, in a separate place to your insights. See the [UK Data Service](https://ukdataservice.ac.uk/learning-hub/research-data-management/)<sup>9</sup> for more guidance on managing and sharing data.

Please note, if you don't have relevant structures in place to protect personal information then don't collect it. See the [Information Commissioner's Office](https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/)<sup>10</sup> for General Data Protection Regulation (GDPR) guidance for organisations.

If you cannot guarantee participant anonymity, ensure that participants know this and provide them with opportunities to withdraw from your work if they do not feel comfortable to continue.

<sup>9</sup> <https://ukdataservice.ac.uk/learning-hub/research-data-management/> (see 'Storing Data')

<sup>10</sup> <https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/>



# BRINGING YOUR FINDINGS TOGETHER

This is the third of five sections of the Qualitative Insight Toolkit.

Qualitative insight is information gathered from people that describes their experiences, opinions, and motivations. This insight can be used to help us understand people's behavior and influence decision making to better suit the needs of people and communities.

This section provides a step-by-step guide on bringing your findings together.

## Section 3: Bringing your findings together

Once you have gathered your qualitative insight, you can then start to bring your findings together. You can follow the stages below to organise, categorise and 'make sense' of the insight you have gathered.

1

**Read through the insight you have gathered**

It's important to get familiar with your insights first. At this stage, make some initial notes for yourself, which may include ideas, themes, or reflections. At this point, you're just thinking about the data you have.

2

**Identify common words or topics (also known as coding)**

There are two main ways to identify common words and topics in qualitative insight:

### **Inductively:**

This approach is about identifying and labelling common words, phrases or topics as they appear to you in the text over time, as you read through your insight. A good approach to use when you're not sure what topics will be in your insight.

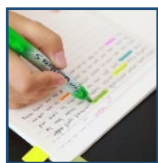
### **Deductively:**

This approach is about identifying topics and themes that you want to look for in advance, then searching for instances of them in your insight. A good approach to use when you know the topics you're interested in and want to gather examples or quotes of experience.

Additional detailed guidance and examples of how to use inductive and deductive approaches to bring your insights together can be found in Appendix 7 in our '*Section 3 Templates: Bringing Your Findings Together*' document here:

<https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/>

There are many methods you can use to identify and label common words, phrases and themes in your insight, including:



Using **printed or digital copies** of your insight to make written notes and colour code different topics.



Using **post-it notes** to write themes/quotes and arrange them across the table.



Using **spider diagrams** to connect themes and subthemes.

	Count
A	
B	
C	

Creating a **frequency table** to count the frequency of specific words, phrases or topics to compare their prevalence in your insight.

Theme	Quote
A	~~~~~
B	~~~~~
C	~~~~~
D	~~~~~

Creating a **theme table** to link common themes, related subthemes and quotes together.



Using **qualitative analysis software** – better suited to large-scale data and individuals/teams with previous research experience.

You can choose a method that works best for you and your insight.

For further guidance and examples of how to use frequency tables and theme tables to bring your insight together, see our '*Section 3 Templates: Bringing Your Findings Together*' document here:

<https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/>

For frequency tables, see Appendix 8 for guidance and Appendix 9 for a template.

For theme tables, see Appendix 10 for guidance and Appendix 11 for a template.

### 3

## Create categories (also known as themes)

Once you have identified your common words or topics, you can then start to organise these into categories or themes. For example, if participants shared information about their different health conditions, your categories or themes might look like this:

### Example words or topics:

*Anxiety; depression; heart condition; pain; broken leg.*

### Example categories or themes:

*Health condition; physical health condition; mental health condition.*

## 4

### Identify patterns across your insight

This is where you focus less on the details and more on identifying relationships, patterns, or trends across your insight. You can identify overarching themes, provide definitions for them, and pull together examples of participant experience or quotes. This will help you build a story with your insights. The names and definitions of your themes may change a lot at this stage as you find more examples across your insight.

## 5

### Review your themes

Take time to step away from your insights, so you can stop, process, and review your themes. When reviewing, ask yourself:

- Do the definitions of my themes reflect the quotes/examples I've gathered?
- Is there any duplication or overlapping of themes? Do I need to adjust these?
- Do my themes really reflect what my participants said?

Remember that your themes are your own interpretations, so they will be influenced by your personal experiences and your connections to the topics, venues, and participants. Asking for a fresh set of eyes on the insight can help you identify new perspectives.

## 6

### Finalise the names and definitions of your themes

Once you're happy with your themes, their definitions, and the examples/quotes you have to evidence them, you're ready to start presenting your findings.

It is good practice to review what consent you have gathered from your participants to ensure that you do not share personal or identifying information about them in your work that they have not given you permission to use. For more guidance on this, see "Gathering Participant Consent" in our '*Section 2: Gathering Qualitative Insight*' guidance document here:

<https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/>



# PRESENTING AND SHARING YOUR FINDINGS

This is the fourth of five sections of the Qualitative Insight Toolkit.

Qualitative insight is information gathered from people that describes their experiences, opinions, and motivations. This insight can be used to help us understand people's behavior and influence decision making to better suit the needs of people and communities.

This section provides options and considerations when presenting and sharing your findings.



## Section 4: Presenting and sharing your findings

This section presents options and considerations for presenting and sharing your findings.

### Choosing Your Outputs

How you choose to present your insights depends on the type of insight you have, your aims, and your audience. The boxes below give examples of outputs and their main advantages:

#### Reports

- Space for detail
- Structured layout

#### Executive summary

- Concise
- Quick to read

#### Journey map

- Visualise thoughts and feelings at milestones

#### Case Studies

- Bring your insights to life
- Show the complexities of human experience

#### PowerPoint slides

- Visual
- Highlight interesting takeaways

#### Word Cloud

- Show the popularity of themes

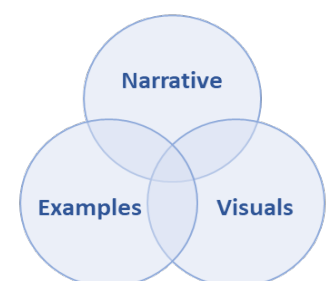
You could also incorporate your insights into your other work, such as annual reports, project evaluations, funding applications, and content marketing. For example, case studies and quotes are powerful for showing the impact of your work.



### Telling a story with your insights

No matter which output method you choose, you will want to tell a story with your insights.

To do so, you could use a combination of: **narrative** to describe or explain the insight you have gathered and the 'So what?' of your findings; **examples** of participant experience and quotes to evidence your point; and **visuals** to engage your audience.



Think about how you will structure your findings. You could break them down by research question, by themes you have identified, or by participant demographics. Alternatively, you might order your findings by their prevalence (how often they were spoken about by your participants), their importance to participants, or in a chronological order.

## Using quotes

- Make sure your quotes illustrate your point
- Give context to your quotes
- Tell the reader who's speaking, e.g. (*A Teacher, aged 40*)
- If you have promised your participants anonymity, ensure that there is no information in your quotes that could personally identify them
- Use square brackets [] to show you've added your own words
- Use ellipsis in square brackets [...] to show omissions or joined phrases
- Don't overuse quotes – try a mix of quotes and paraphrasing:
  - **Quote:** "My back pain means I can't go out with friends" (*Stacey*)
  - **Paraphrase:** Stacey said her back pain stops her from socialising.



Choose whether you want to clean up any grammatical errors or repetitions of 'erm'. You might keep them to portray someone's dialect or mannerisms.



## Writing or speaking about people

### **Thinking about your participants**

Put yourself in your participant's shoes when sharing their experiences. There may be parts of a person's story you might exclude in your reporting because you noticed they looked uncomfortable sharing that information.

### **Sharing information about your participants**

Your participants may have shared personal or identifying information with you that they do not want to share publicly or in your reporting. It is good practice to review what consent your participants have given you before sharing your findings.

For more guidance on this, see "Gathering Participant Consent" in our '*Section 2: Gathering Qualitative Insight*' guidance document here:

<https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/>

### **Person-centred language**

People are more than their circumstances, so put people first when talking about them. For example, rather than using 'diabetics' you can say 'people with diabetes'.

## Talking about ethnicity

Wirral Council no longer uses the term 'BAME' (Black, Asian, and Minority Ethnic) as it disguises huge differences in outcomes between ethnic groups, and it emphasises certain ethnic groups but omits others. Wirral Council encourages the use of specific ethnic groups. The terms 'ethnic minority' or 'people from ethnic minority backgrounds' are only used when absolutely necessary to group people together.

## Adapting to your audience

Consider the audiences that may read or hear your work. To make your outputs accessible you should:

- Use simple language
- Be concise
- Define acronyms
- Use pictures and icons
- Create easy read versions
- Use formats that can be translated online

Also consider getting advice on best practice from the community you are reporting on or sharing your insights with.

## Sharing your findings and outcomes

### Feeding back to the people you have engaged with

Sharing your findings and the impact of your work is important for building trusting relationships with the participants, communities and organisations you have engaged with.



Showing participants how their contribution has been used and what has changed as a result can help them to feel listened to and valued for their experience. This in turn can encourage future participation.

### Sharing your insights with Public Health

If you have gathered insights which show Wirral resident's experiences and needs around health and wellbeing, please consider sharing your insights with Wirral Council's Public Health team. This will help Public Health build a repository of insights on health and wellbeing in Wirral.

To share your insights with Public Health email [qualitativeinsightteam@wirral.gov.uk](mailto:qualitativeinsightteam@wirral.gov.uk)

Please include a note of your participant's demographics. Where possible, include participant's full postcode, age group, gender, and employment status. This information will support Public Health in mapping who has been engaged with.



## REFLECTING ON YOUR WORK

There are five sections of the Qualitative Insight Toolkit, and this is the fifth and final one.

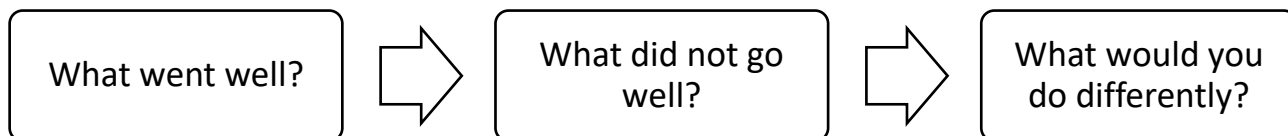
Qualitative insight is information gathered from people that describes their experiences, opinions, and motivations. This insight can be used to help us understand people's behavior and influence decision making to better suit the needs of people and communities.

This section provides three core questions to ask when you have completed your project. These questions help you to identify successes and acknowledge challenges in the work you have completed and consider lessons you have learned to take forward into future work.

## Section 5: Reflecting on your work

There is no one 'perfect' way to gather qualitative insight, and even the most experienced researchers face unforeseen challenges. Taking time to reflect on your successes and challenges will help you incorporate lessons learned into future work.

Thinking back on each section of the toolkit you have used, ask yourself:



### Reflections table

The table below could help you to record your own reflections from your insight gathering work. You could also include feedback you have received from your colleagues or participants and organisations you have engaged with through your work.

	What went well?	What did not go well?	What would you do differently?
Section 1: Planning your approach			
Section 2: Gathering your insight			
Section 3: Bringing your insight together			
Section 4: Presenting and sharing your insight			

## Additional reflection questions

The following questions below may also help you identify what worked well, what didn't work well, and what would you do differently for each section of the toolkit you have completed.

### *Section 1: Planning your approach*

- Did you manage to find out what you wanted?
- Did you have enough resources, capacity, and training to carry out the project?

### *Section 2: Gathering your insight*

- Did you engage with the communities you planned to engage with?
- Were the methods you chose appropriate for the communities you spoke to?

### *Section 3: Bringing your insight together*

- Which of the six stages did you use when bringing your insight together?
- What techniques and methods worked best for you or your organisation?

### *Section 4: Presenting and sharing your insight*

- Thinking on the communities you spoke to can they now access your insight?
- Was the presentation of your findings appropriate for your intended audience(s)?

## Next steps and future opportunities

Congratulations, you've completed your insight gathering work! Before you move on to your next piece of work, it's worth considering next steps and future opportunities for the insight you have already gathered.

### **Building relationships**

Reflect on any connections you've made with people and organisations throughout your work and consider how you may continue to build these relationships going forward. Keep the conversations going even after you have completed your insights project.

### **Putting your insights to good use**

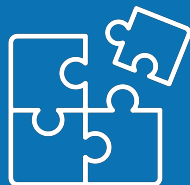
You may want to think about other ways to use your insights. The insights you've gathered could be rich and powerful data that could help you and other organisations develop and inform changes to policies and/or decision-making practices. Therefore, it is important to share your insights with the right people. Please see section 4 of the toolkit 'Presenting and Sharing Your Insight' for more guidance on this topic.

### **Developing your next insight gathering project**

Now that you have completed your insight project, do the findings make you want to understand new areas further; are there questions you want more detailed answers to; do you want to work with different groups of people to get another perspective from? You can always use your findings to help you develop your next insight project.

# Qualitative Insight Toolkit Appendix Templates

Templates and guidance to support you  
to gather qualitative insight





# Toolkit Appendix Templates Contents

The following templates can help you to plan your approach, gather qualitative insight and bring your findings together.

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<b>Section 2 Templates: Gathering qualitative insight</b>	<b>36</b>
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# Qualitative Insight Toolkit

## Section 1 Templates for:



## PLANNING YOUR APPROACH

This document includes templates to support you to plan your qualitative insight project.

Qualitative insight is information gathered from people that describes their experiences, opinions, and motivations. This insight can be used to help us understand people's behaviour and influence decision making to better suit the needs of people and communities.

## Appendix 1: Qualitative Insight Plan Template

Use this template to plan your insight gathering.

**1. What do I already know about this topic or community?**

**2. What do I want to find out?**

**3. What capacity do I have?**

**4. Who will I engage with?**

**5. How will I gather my insights?**

**6. What potential risks could occur?**

**7. How will I bring my findings together?**

**8. What will I do with my insights?**



## GATHERING QUALITATIVE INSIGHT

This document includes templates to support you to collect qualitative insight.

Qualitative insight is information gathered from people that describes their experiences, opinions, and motivations. This insight can be used to help us understand people's behavior and influence decision making to better suit the needs of people and communities.

## Appendix 2: Demographic Questions and Response Categories

Asking demographic questions and collecting demographic data in consistent ways can help you identify common experiences and patterns in the insight you gather. It can also help you balance your sample of participants to ensure you gather a diverse range of experiences that reflect the community you're engaging with.

When asking demographic questions, you may choose to allow space for participants to provide their own responses or provide specific categories for participants to select from. Whatever you choose, remember to only ask demographic questions that are relevant to your insight.

The tables below provide some examples of demographics, suggested questions, and response categories that you could use.

Demographic	Postcode	Age	Gender	Employment Status
<b>Question</b>	What is your postcode?	What is your age/ age group?	What is your gender?	What is your employment status?
<b>Response Categories</b>	Full postcode is preferred	1. Under 18 2. 18-29 3. 30-39 4. 40-49 5. 50-59 6. 60-69 7. 70-79 8. 80+ 9. Prefer not to say	1. Male 2. Female 3. Transgender 4. Non-binary 5. Prefer to use my own term (please specify) 6. Prefer not to say	1. Employed (full time) 2. Employed (part time) 3. Self-employed 4. Student 5. Unemployed 6. Retired 7. Other 8. Prefer not to say

Demographic	Disability	Sexual Orientation	Religion
<b>Question</b>	Do you consider yourself to have a disability?	What is your sexual orientation?	What is your religion?
<b>Response Categories</b>	1. Yes 2. No 3. Prefer not to say	1. Straight/ Heterosexual 2. Gay or Lesbian 3. Bisexual 4. Prefer to use own term (please specify) 5. Prefer not to say	1. No religion 2. Christian ( <i>including Church of England, Catholic, Protestant and all other Christian denominations</i> ) 3. Buddhist 4. Hindu 5. Jewish 6. Muslim 7. Sikh 8. Any other religion 9. Prefer not to say

Demographic	Ethnic Origin
Question	Which of the following groups do you consider yourself to belong to?
Response Categories	<ol style="list-style-type: none"> <li>1. White – English/Welsh/Scottish/ Northern Irish/British</li> <li>2. White – Irish</li> <li>3. White – Any other White background</li> <li>4. Black or Black British – Caribbean</li> <li>5. Black or Black British – African</li> <li>6. Black or Black British – Any other Black background</li> <li>7. Asian or Asian British – Indian</li> <li>8. Asian or Asian British – Pakistani</li> <li>9. Asian or Asian British – Bangladeshi</li> <li>10. Asian or Asian British – Chinese</li> <li>11. Asian or Asian British – Any other Asian background</li> <li>12. Mixed – White and Black Caribbean</li> <li>13. Mixed – White and Black African</li> <li>14. Mixed – White and Asian</li> <li>15. Mixed – Any other Mixed background</li> <li>16. Other – Arab</li> <li>17. Other – Any other group</li> <li>18. Travelling – Gypsy or Roma</li> <li>19. Travelling – Traveller of Irish descent</li> <li>20. Travelling – Other</li> <li>21. Other</li> <li>22. Prefer to use own term (please specify)</li> <li>23. Prefer not to say</li> </ol>

Examples of further demographic questions and response categories can be found in the [Census 2021 Questionnaire for Individuals](#)<sup>11</sup>. For more information on how to ask demographic questions in your engagements, see the following [Healthwatch report](#)<sup>12</sup>.

<sup>11</sup> <https://www.ons.gov.uk/census/censustransformationprogramme/questiondevelopment/census2021paperquestionnaires>

<sup>12</sup> [https://network.healthwatch.co.uk/sites/network.healthwatch.co.uk/files/20220411\\_collecting%20demographic%20data%20updated%20for%20GDPR.pdf](https://network.healthwatch.co.uk/sites/network.healthwatch.co.uk/files/20220411_collecting%20demographic%20data%20updated%20for%20GDPR.pdf)

### Appendix 3: Insight Grid Templates

Below are examples of insight grids you could use to collect notes from your conversations. **Examples 1, 2 and 3** are blank – these can be adapted to suit your needs. You could vary the information collected or amend the space for making notes. **Examples 4 and 5** show how insight grids could be used in practice to explore people's views on their local area.

#### **Example 1:**

<b>Qualitative Insight Grid</b>	
Project Title:	
Research Topics:	
Completed by:	Date Completed:
Reviewed by:	Date Reviewed:
<div style="background-color: #4a7ebb; color: white; text-align: center; padding: 5px;"><b>Questions</b></div>	<div style="background-color: #4a7ebb; color: white; text-align: center; padding: 5px;"><b>Notes</b></div>

## Example 2:

### Qualitative Insight Grid

<b>Project title:</b>			
<b>Completed by:</b>		<b>Date completed:</b>	
<b>Demographic 1:</b>	<b>Demographic 2:</b>	<b>Demographic 3:</b>	
<b>Topic/Question 1:</b> <b>Prompts:</b>	<b>Topic/Question 2:</b>		
<b>Topic/Question 3:</b>	<b>Topic/Question 4:</b>		



Example 3:

Qualitative Insight Grid

Project name:		Completed by:	
Location:		Date completed	

First Name:		Age:		Full postcode:	
Employment status:				Gender:	

Question 1:	Question 2:
Question 3:	Question 4:

#### Example 4:

This is an example of what an insight grid might look like in practice.

<b>Project title:</b>	<i>People's views on their local area</i>		
<b>Completed by:</b>	<i>Jennifer</i>	<b>Date completed:</b>	<i>10/09/23</i>

<b>Name:</b>	<b>Employment Status:</b>
<i>Holly</i>	<i>Self-employed</i>

<b>Demographic 1:</b>	<b>Demographic 2:</b>	<b>Demographic 3:</b>
<i>34</i>	<i>CHXX 6XX</i>	<i>Female</i>

**Question: How do you feel about your local area?**

Strengths	Weaknesses
<ul style="list-style-type: none"><li><i>Green spaces</i></li></ul>	<ul style="list-style-type: none"><li><i>Traffic outside the school</i></li></ul>
Opportunities	Challenges
<ul style="list-style-type: none"><li><i>Better public transport options</i></li></ul>	<ul style="list-style-type: none"><li><i>The roads are too narrow for buses</i></li></ul>

## Example 5:

This is an example of what an insight grid might look like in practice.

<b>Project name:</b>	<i>People's Views on Their Local Area</i>	<b>Completed by:</b>	<i>Jennifer</i>
<b>Location:</b>	<i>Highstreet</i>	<b>Date completed</b>	<i>10/09/23</i>

Participant demographics			
<b>First name:</b>	<i>Holly</i>	<b>Age:</b>	<i>34</i>
<b>Employment status:</b>	<i>Self-employed dance teacher</i>	<b>Full postcode:</b>	<i>CHXX 6XX</i>
		<b>Gender:</b>	<i>Female</i>


  

1. How do you feel about your local area? Likes/dislikes	2. What things are important to you in your local area? Places, spaces, people
<ul style="list-style-type: none"> <li><i>It's a nice place to raise children</i></li> <li><i>Not much sense of community</i></li> <li><i>"The park is great, it's always clean"</i></li> </ul>	<ul style="list-style-type: none"> <li><i>Having her dance studio, shops, and the primary school close by - she doesn't have a car</i></li> <li><i>Having friends and family close</i></li> </ul>
3. Are there any issues affecting people's health and wellbeing in your local area? If so, what?	4. What changes could be made to your local area to improve health and wellbeing?
<ul style="list-style-type: none"> <li><i>Cost of living: "Parents are pulling their kids out of my dance classes because they can't afford it anymore"</i></li> <li><i>The traffic</i></li> </ul>	<ul style="list-style-type: none"> <li><i>Free sports opportunities for all ages</i></li> <li><i>Less cars on the road, especially near the school - "It'd be safer for the kids, and less pollution"</i></li> </ul>

## Appendix 4: Activity Sheet Templates

The examples below show how you could design activity sheets to get your participants involved in capturing their insights. Participant's details can be filled in at the bottom of the sheets to help you organise your findings later.

### Example 1:



**Age...**

**My occupation is...**

**In my spare time I...**

**ABOUT YOU**

**Name:**

**I live in...**

**I live with...**

**My health and wellbeing...**

Participant pseudonym/name/ID:

Postcode:

Date Completed:

Example 2:

How do you feel about your local area?



Likes



Dislikes

Participant pseudonym/name/ID:

Age:

Postcode:

Date Completed:

Gender:

Employment Status:

Example 3:

Who could help improve health and wellbeing in your local area? And how?

Who?

E.g., My neighbours

Who?

Who?

How?

E.g., We could set up a book club

How?

How?

Participant pseudonym/name/ID:

Age:

Postcode:

Qualitative Insight Team, Public Health, Wirral Council

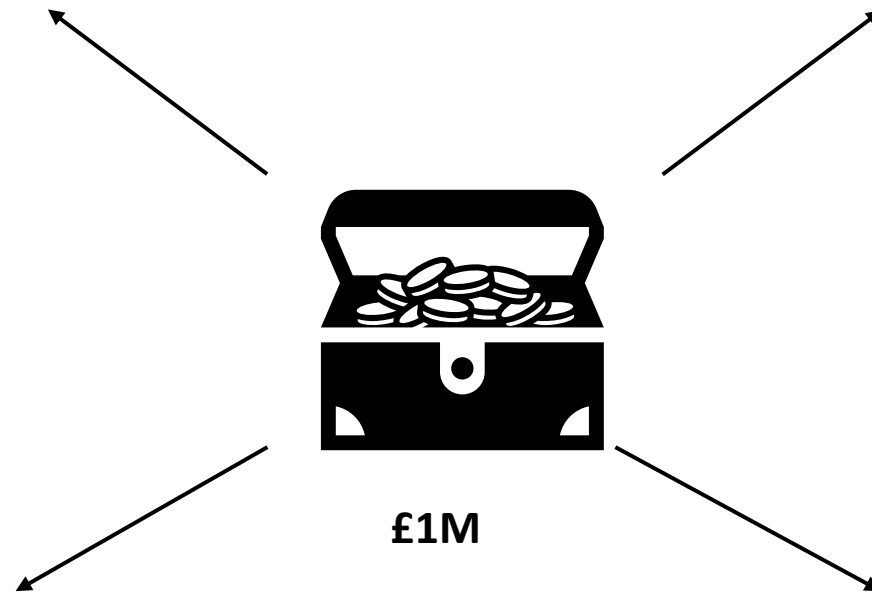
Date Completed:

Gender:

Employment Status:

**Example 4:**

**How would you spend £1 million to improve health and wellbeing in your local area?**



**Participant pseudonym/name/ID:**

**Age:**

**Postcode:**

**Date Completed:**

**Gender:**

**Employment Status:**

### Example 5:

## Your Health and Wellbeing – Past, Present, Future

**Present**

- How do you feel about your health and wellbeing now?
- What helps you to keep healthy and well?

**Past**

- In the past 5 years, how was your health and wellbeing?

**Future**

- How do you see your health and wellbeing in the next 5 years? (Same, better, worse)
- What could help you improve your health and wellbeing?

Participant pseudonym/name/ID:

Age:

Postcode:

Date Completed:

Gender:

Employment Status:



## Appendix 5: Consent Form Guidance

**Title:** Opportunity to explain the purpose of your consent form.

**Introduction:** Who you are and why you are gathering qualitative insight.

**Your Participation:** Explain the activities you'd like your participants to take part in. You could include dates/time, venues, and things they need to bring.

**What to do next:** Tell your participants what they need to do if they're happy to take part. You'll likely be in the room with them, so they can pass their consent form straight back to you. On other occasions, participants may need to return their consent form elsewhere.

**Participant declaration:** Once participants have read the consent form, had any questions answered, and are happy to participate, they can provide their signed consent.

### QUALITATIVE INSIGHT CONSENT FORM

This consent form explains who we are and the purposes of our insight gathering. It also explains how we'll use the information we gather from your participation. Taking part is your choice. You will need to give consent if you wish to take part by completing this form.

1. Introduction	
Who are we?	
Why are we gathering community insight?	
2. Your participation	
What will you take part in?	
What if you decide you don't want to take part?	
3. How will we use your insight	
How will we report on the insight we gather from you?	
Who will we share this insight with?	
Will you be identifiable in the insight we report on?	
4. How will we store your insight	
Where will we store your details and the insight you have shared with us?	
How long will we store your details and the insight you have shared with us?	
5. What to do next	
Who do I return this form to and how?	
Who do I contact if I have more questions?	

6. Gaining your consent	Yes / No / Not Applicable
Do you consent to us <b>using the insight you have provided</b> for the purposes mentioned above?	
Do you consent to us <b>using notes from this engagement</b> for the purposes mentioned above?	
Do you consent to us <b>recording your engagement and using that recording</b> for the purposes mentioned above?	
Do you consent to us <b>using anonymised quotes of your insight</b> for the purposes mentioned above?	

7. Participant Declaration	
Your Name:	
Date:	
Signature:	

**How will we use your insight:** How you will present and share the insights your participants provide. You should let participants know if they'll be identifiable in your outputs. You could ask if they have a preferred pseudonym.

**How will we store your insight:** How participant's personal information and insight will be stored securely by you. This includes contact details, protected characteristics, demographics, audio recordings, engagement notes, etc.

**Gaining your consent:** Allow your participants to consent to different aspects of your work. For example, a participant may be happy for you to use engagement notes for your reporting but don't wish to be audio recorded. Giving your participants a choice can build their confidence to take part.

## Appendix 6: Consent Form Template

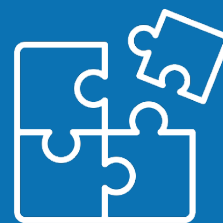
This consent form template contains suggested questions and space for you to add your own.

<b>1. Introduction</b>	
Who are we?	
Why are we gathering community insight?	
<b>2. Your Participation</b>	
What will you take part in?	
What if you decide you don't want to take part?	
<b>3. How will we use your insight</b>	
How will we report on the insight we gather from you?	
Who will we share this insight with?	
Will you be identifiable in the insight we report on?	
<b>4. How will we store your insight</b>	
Where will we store your details and the insight you have shared with us?	
How long will we store your details and the insight you have shared with us?	

5. What to do next	
Who do I return this form to and how?	
Who do I contact if I have more questions?	

6. Gaining your consent	Yes / No / Not Applicable
Do you consent to us <b>using the insight you have provided</b> for the purposes mentioned above?	
Do you consent to us <b>using notes from this engagement</b> for the purposes mentioned above?	
Do you consent to us <b>recording your engagement and using that recording</b> for the purposes mentioned above?	
Do you consent to us <b>using anonymised quotes of your insight</b> for the purposes mentioned above?	

7. Participant Declaration	
Your Name:	
Date:	
Signature:	



## BRINGING YOUR FINDINGS TOGETHER

This document includes templates and additional guidance to support you to ‘make sense’ of your findings.

Qualitative insight is information gathered from people that describes their experiences, opinions, and motivations. This insight can be used to help us understand people’s behavior and influence decision making to better suit the needs of people and communities.

## Appendix 7: Identifying Common Words, Themes, and Subthemes Guidance

The examples below show how you could use colour coding and text formatting to identify common words, phrases, themes, and subthemes in your insights. Example 1 uses an inductive approach to identify and label (or 'code') common words, phrases and topics that is found in the data as it is read through. Example 2 uses a deductive approach, starting with predefined labels or 'codes' that are then searched for in the data. The same three quotes, in response to the question *'How do you feel about your local area?'* are used in each example to show how these two approaches differ.

### Example 1: Inductive Approach



- Common words, phrases or topics are identified in the quote and given labels or 'codes' (see the example of this for Participant A).
- The word 'park' (shown in **bold text**) can be found in all three quotes. This could be identified as a potential theme in this insight, as multiple people have talked about parks in their response to the question.
- Each participant mentions different things about parks (shown in **grey highlight**), which can also be labelled or 'coded' (as in the example for Participant A). If more instances of these topics occur in further quotes, this could signify a subtheme of the main theme 'park'.
- Potential themes, subthemes and corresponding quotes identified could be collated into a theme table (see Appendix 10) to organise and refine the insight gathered for reporting.
- Examples of potential themes and subthemes identified in the quotes above using an inductive approach include:
  - **Theme:** Park **Subthemes:** Activities for children, use of park in all seasons, close proximity to park
  - **Theme:** Neighbours **Subthemes:** Positive views of neighbours
  - **Theme:** Community centres **Subthemes:** hot food, community cafe
  - **Theme:** Traffic **Subthemes:** Busy road, safety when crossing the road, traffic near the school

## Example 2: Deductive Approach

### Participant A:

Code: Green Spaces

"We have a great local park with plenty to do for the kids and our neighbours are lovely. **The traffic is getting worse near the school though.**"

Code: Traffic

### Participant B:

"I've enjoyed going to the local community centre recently, they do hot food in the café. The park is also great to use no matter the weather."

### Participant C:

We use the park in all seasons. It's great to just cross over the road and be there. We do live on a **busy road** though, which can be **difficult to cross when you have little ones.**

- Before reading the quotes, two codes were developed. The first one was 'Green Spaces' and the second one was 'Traffic'.
- When reading through each quote, comments about green spaces were highlighted in grey and comments about traffic were shown in **bold text**.
- This information could be collated into a theme table (see Appendix 10) or frequency table (see Appendix 8) to look for subthemes related to each of the main themes, 'Green Spaces' and 'Traffic'.
- A deductive approach can help you to stay focused on the themes you're interested in and can help you to understand what different people say about a specific topic. However, because this approach starts with and focuses on predefined codes or themes, there is a risk of missing other themes that exist in the insight.
- If starting with a deductive approach, once you have identified your insight related to predefined themes, you could then consider using an inductive approach to identify any remaining themes, to get the most of your insights.
- Examples of potential themes and subthemes identified in the quotes above using a deductive approach include:
  - **Theme:** Green spaces      **Subthemes:** Parks, use of green spaces in all types of weather
  - **Theme:** Traffic      **Subthemes:** Traffic near to schools, busy roads, road safety, crossing the road with children

## Appendix 8: Frequency Table Guidance

Frequency tables are used to count responses, topics, or themes in your insight. This allows you to break down who said what, and you can compare the prevalence of topics or themes in your insight. See Appendix 9 for a blank frequency table template, or you can create your own version in other formats (such as a Microsoft Excel spreadsheet).

**Participant number or pseudonym:** Use this to keep a record of who said what.

**Question asked and insight gathered:** Include participant's responses to the question

**Remaining columns:** Use the remaining columns to place the names of common topics or themes you've identified in your insight. Then, read through each participant comment and mark in the columns if that topic was mentioned. The number 1 is used below, but you could include a quote instead. You can then see the total numbers of responses to each topic/theme at the bottom of the table. You can use these numbers to compare the prevalence of what is spoken about by your participants.

Participant number or pseudonym	Question 1: How do you feel about your local area?	Good quote to use	Positive comment	Negative comment	Neutral comment	Local people	Green spaces	Traffic	Activities for children
01	<i>"I like where I live. My neighbours are lovely"</i>		1			1			
02	Takes children to the play groups which helps her to meet local people and reduce isolation.	1	1			1			1
03	<i>"The park is great, it's always clean"</i>		1				1		
04	<i>"The parks are lovely but there are no activities for the kids to do after school hours"</i>	1	1	1			1		1
05	<i>"The traffic is getting worse, especially near the primary school"</i>	1		1				1	
06	Doesn't like living on the main road. Has to keep windows shut to block out the noise of cars.			1				1	
<b>Total Responses</b>		3	4	3	0	2	2	2	2

Appendix 9: Frequency Table Template

Participant number or pseudonym	Question Asked/Topic:	Good quote to use						
Total Responses								



## Appendix 10: Theme Table Guidance

A theme table can be used to bring the themes, related subthemes, and quotes/examples of experience from your insight together in one place. They are particularly useful for comparing themes and quotes across your insight. The guidance below shows how a theme table could be used to organise responses to the question: *'How do you feel about your local area?'* See Appendix 11 for a blank theme table template.

<b>Theme:</b> What is the main topic being discussed?	<b>Sub Theme:</b> What are the smaller topics being discussed, related to each main topic?	<b>Definition:</b> Provide a description of your subtheme as it relates to your main theme. You and your team can then add relevant quotes or examples of insight into the table. Providing a definition is particularly useful if you have multiple people reviewing your insight.	<b>Examples/Quotes:</b> Provide quotes or examples of experience to evidence what your participants think about a particular topic. Identifying three different quotes or examples of experience (ideally from different participants) for each subtheme is a good standard for evidencing your identified themes, as it shows a potential pattern in your insight that you could report on. This is particularly useful if you are reporting on what a community think about a particular issue.		
Theme	Sub Theme	Definition of Subtheme	Quote/Experience 1	Quote/Experience 2	Quote/Experience 3
Local People	Good neighbours	Insight related to positive experiences with neighbours	<i>"Me neighbours put the bin out for me when I can't. That didn't happen where I used to live, people just ignored you"</i>	<i>"My neighbours are lovely"</i>	Thinks good neighbours makes a good community
Local People	Community groups	Insight related to community groups	Likes the variety of free day-time activities on offer for older people.	<i>"The ladies at the knitting group down the road are amazing"</i>	
Traffic	Increased traffic	Comments about the increase of traffic in the area	<i>"The traffic by the primary school is getting worse"</i>	<i>"It used to be a quiet town, but now there's so much traffic"</i>	The new supermarket has caused more traffic since it opened last year
Traffic	Noise	Comments about the noise pollution caused by traffic	Doesn't like living on the main road. Has to keep windows shut to block out the noise of cars.		

## Appendix 11: Theme Table Template

Question/topic:					
Theme	Sub Theme	Definition	Quote / Experience 1	Quote / Experience 2	Quote / Experience 3

**Theme:** What is the main topic being discussed?

**Sub Theme:** What are the smaller topics being discussed, related to each main theme?

**Definition:** Provide a description of your subtheme as it relates to your main theme.

**Quote or Experience:** Provide quotes or examples of experience to evidence what your participants think about a particular topic.

## Looking for more information on the Qualitative Insight Toolkit?

The Qualitative Insight Toolkit provides guidance and templates to support people to gather their own qualitative insight. To access the full toolkit guidance and additional toolkit templates that you can print and use, see:

<https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/>

### Contact

If you have questions or feedback about this resource, please email the Qualitative Insight Team at [qualitativeinsightteam@wirral.gov.uk](mailto:qualitativeinsightteam@wirral.gov.uk).

### About us

Qualitative Insight is a type of research that listens to people to gather their thoughts, experiences, and ideas on particular subjects. The Qualitative Insight Team at Wirral Council work with residents to ensure that their voices are heard when informing council policy and decision making. The team supports the delivery of the Health and Wellbeing strategy, in which residents' voices are a key strand.

### Acknowledgements

The Qualitative Insight Toolkit has been designed by the Qualitative Insight Team, Public Health, Wirral Borough Council.

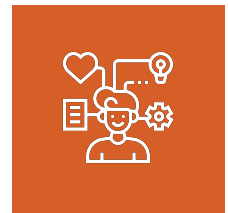
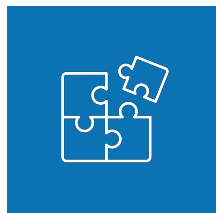
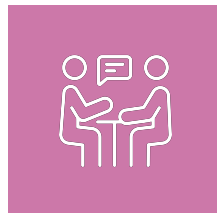
<https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/>

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# Qualitative Insight Toolkit



***The Qualitative Insight Team would like to wish you  
the best of luck in gathering your insights.***

***If you have any questions, feedback, or you'd like to share  
your insights with Public Health, please email:  
[qualitativeinsightteam@wirral.gov.uk](mailto:qualitativeinsightteam@wirral.gov.uk)***