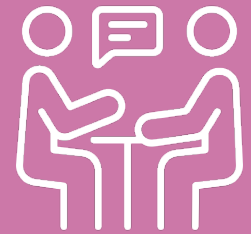


Qualitative Insight Toolkit

Section 2 Templates for:



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
Question	What is your postcode?	What is your age/ age group?	What is your gender?	What is your employment status?
Response Categories	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
Question	Do you consider yourself to have a disability?	What is your sexual orientation?	What is your religion?
Response Categories	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"> 1. White – English/Welsh/Scottish/ Northern Irish/British 2. White – Irish 3. White – Any other White background 4. Black or Black British – Caribbean 5. Black or Black British – African 6. Black or Black British – Any other Black background 7. Asian or Asian British – Indian 8. Asian or Asian British – Pakistani 9. Asian or Asian British – Bangladeshi 10. Asian or Asian British – Chinese 11. Asian or Asian British – Any other Asian background 12. Mixed – White and Black Caribbean 13. Mixed – White and Black African 14. Mixed – White and Asian 15. Mixed – Any other Mixed background 16. Other – Arab 17. Other – Any other group 18. Travelling – Gypsy or Roma 19. Travelling – Traveller of Irish descent 20. Travelling – Other 21. Other 22. Prefer to use own term (please specify) 23. Prefer not to say

Examples of further demographic questions and response categories can be found in the Census 2021 Questionnaire for Individuals¹. For more information on how to ask demographic questions in your engagements, see the following Healthwatch report².

¹<https://www.ons.gov.uk/census/censustransformationprogramme/questiondevelopment/census2021paperquestionnaires>

²https://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:

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

Example 2:

Qualitative Insight Grid

Project title:			
Completed by:		Date completed:	

Demographic 1:	Demographic 2:	Demographic 3:

Topic/Question 1: Prompts:	Topic/Question 2:
Topic/Question 3:	Topic/Question 4:

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.

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

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

Demographic 1:	Demographic 2:	Demographic 3:
<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"><i>Green spaces</i>	<ul style="list-style-type: none"><i>Traffic outside the school</i>
Opportunities	Challenges
<ul style="list-style-type: none"><i>Better public transport options</i>	<ul style="list-style-type: none"><i>The roads are too narrow for buses</i>

Example 5:

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

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

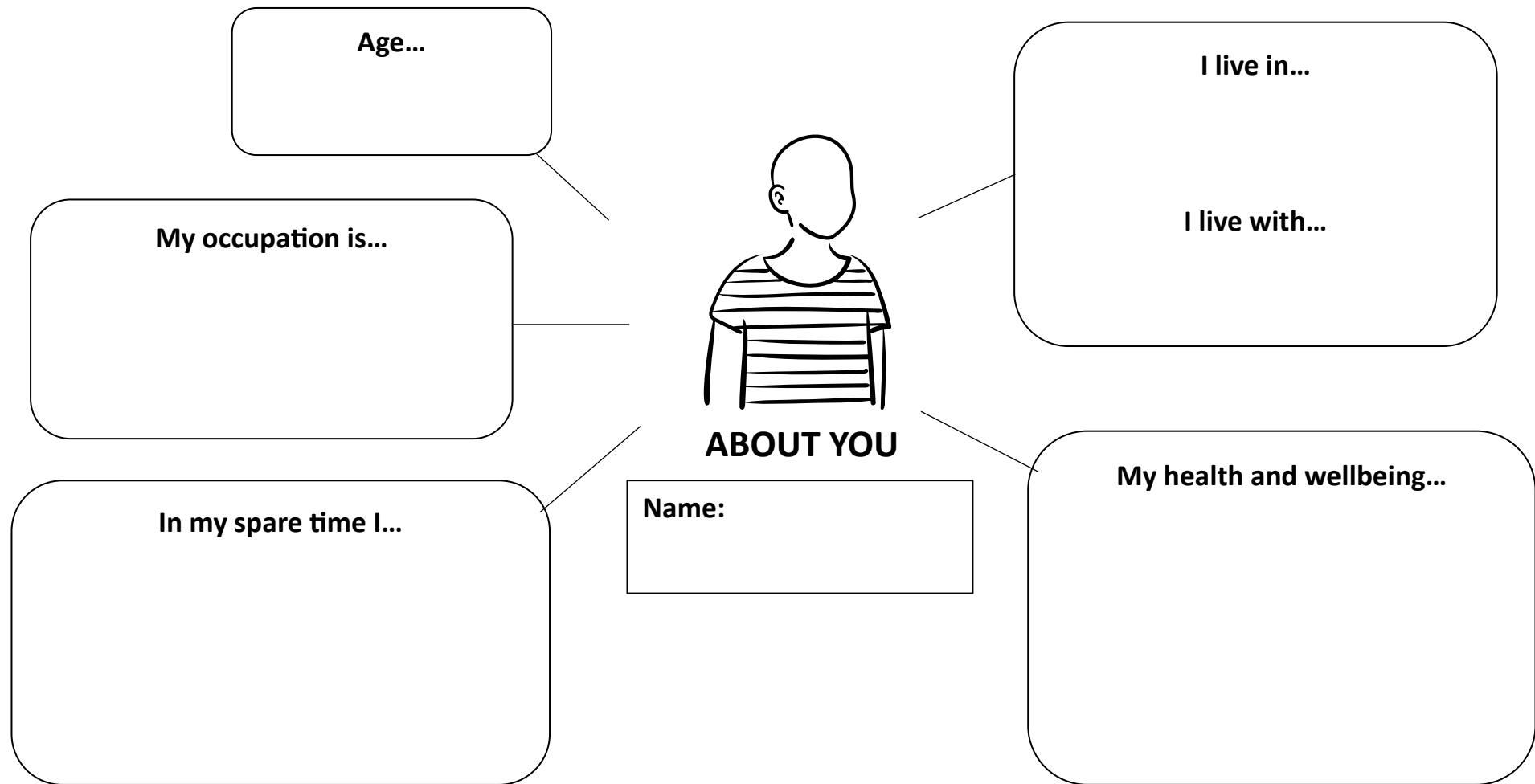
Participant demographics					
First name:	<i>Holly</i>	Age:	<i>34</i>	Full postcode:	<i>CHXX 6XX</i>
Employment status:	<i>Self-employed dance teacher</i>			Gender:	<i>Female</i>

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"><i>It's a nice place to raise children</i><i>Not much sense of community</i><i>"The park is great, it's always clean"</i>	<ul style="list-style-type: none"><i>Having her dance studio, shops, and the primary school close by - she doesn't have a car</i><i>Having friends and family close</i>
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"><i>Cost of living: "Parents are pulling their kids out of my dance classes because they can't afford it anymore"</i><i>The traffic</i>	<ul style="list-style-type: none"><i>Free sports opportunities for all ages</i><i>Less cars on the road, especially near the school - "It'd be safer for the kids, and less pollution"</i>

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:



The diagram features a central line drawing of a person's head and shoulders, wearing a striped shirt. Below the drawing is the text "ABOUT YOU". Six lines radiate from the central figure to six different text boxes arranged around it:

- Age...** (top left)
- My occupation is...** (middle left)
- In my spare time I...** (bottom left)
- Name:** (bottom center, in a rectangular box)
- I live in...** (top right)
- I live with...** (middle right)
- My health and wellbeing...** (bottom right)

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

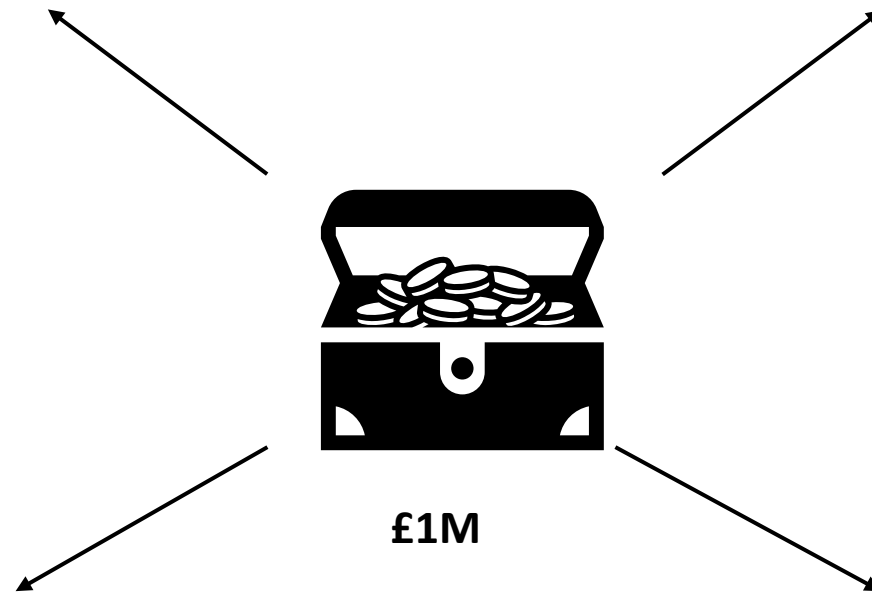
Date Completed:

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

• How do you feel about your health and wellbeing now?

• What helps you to keep healthy and well?

Past **Present** **Future**

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

• 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 using the insight you have provided for the purposes mentioned above?	
Do you consent to us using notes from this engagement for the purposes mentioned above?	
Do you consent to us recording your engagement and using that recording for the purposes mentioned above?	
Do you consent to us using anonymised quotes of your insight 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.

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 using the insight you have provided for the purposes mentioned above?	
Do you consent to us using notes from this engagement for the purposes mentioned above?	
Do you consent to us recording your engagement and using that recording for the purposes mentioned above?	
Do you consent to us using anonymised quotes of your insight for the purposes mentioned above?	

7. Participant Declaration	
Your Name:	
Date:	
Signature:	

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.

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/>

Icon shown on cover page made by *muh Zakaria* from www.flaticon.com.