**ACTwatch Qualitative Training – Facilitator Notes**

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# **Training Tips for Facilitators**

* **Technical Preparation:** Test all audio equipment and software before session
* **Sample Materials:** Prepare relevant audio samples for practice
* **Individual Support:** Be available for one-on-one technical assistance
* **Quality Emphasis:** Consistently reinforce quality over speed
* **Real Examples:** Use examples from similar research contexts
* **Follow-up Plan:** Establish ongoing support system for transcribers

# **General Facilitation Guidelines**

**Before Each Session:**

* Review participant background and experience levels
* Test all technical equipment and materials
* Prepare relevant local examples and scenarios
* Set up room for interactive activities
* Have backup plans for technical issues

**During Sessions:**

* Maintain energy through varied activities
* Encourage questions and practical concerns
* Adapt pace based on participant engagement
* Use local context and examples throughout
* Monitor time while allowing for important discussions

**After Sessions:**

* Collect feedback on content and delivery
* Follow up on any technical or procedural questions
* Provide additional resources as needed
* Plan any necessary refresher training
* Document lessons learned for future sessions

**Cultural Adaptation Notes:**

* Modify examples to reflect local pharmacy/ outlet and health system contexts
* Adjust interaction styles to match cultural norms
* Consider language and translation needs
* Adapt timing to local working patterns and preferences
* Include relevant local regulations and requirements

# **Module by module notes**

## Module 1: Registration and Introduction to ACTwatch Lite

**Duration:** 2 hours  
**Participants:** All training attendees  
**Materials Needed:** Registration sheets, printed agenda, general knowledge pre-test, flip chart paper, markers

**Overview**

This introductory module sets the foundation for the entire training program. It establishes group norms, provides essential context about malaria and ACTwatch research, and ensures all participants understand the training objectives and study purpose. The session includes participant introductions, ground rules establishment, and baseline knowledge assessment.

**Detailed Session Plan**

**Registration and Introductions (20 minutes)**

**Slides:** Title slide, Registration and Introductions

**Facilitator Notes:**

* Have registration sheets ready as participants arrive
* Set up name tags or tent cards for participants
* Create a welcoming atmosphere from the start
* Take note of participant backgrounds for later reference

**Activity Instructions:**

1. Welcome participants and have them sign in (5 min)
2. Facilitator introduces themselves and training team (5 min)
3. Participant introductions using the 5 questions (10 min)

**Speaker Notes:** "Welcome everyone to the ACTwatch Lite training. Before we begin, let's get to know each other. Please share your name, where you're from, your background or institution, any experience with ACTwatch, and your favorite food - this last one helps us remember each other!"

**Key Messages:**

* Everyone's experience and perspective is valuable
* This training will build on participants' existing knowledge
* We want to create a collaborative learning environment

### 1.1 Presentation of Training Agenda (10 minutes)

**Slides:** "1.1 Presentation of the Training Agenda" and agenda screenshot placeholder

**Facilitator Notes:**

* Walk through the complete training schedule day by day
* Highlight key milestones and assessments
* Allow time for schedule-related questions
* Distribute printed copies of the agenda

**Speaker Notes:** "Here's what we'll be covering over the next [X] days. You'll notice we have a mix of presentations, hands-on practice, and assessments. Each day builds on the previous one, so attendance at all sessions is crucial."

**Key Messages:**

* Training is comprehensive and sequential
* All components are necessary for certification
* Participants should plan to attend all sessions

### 1.2 Ground Rules and Expectations (15 minutes)

**Slides:** "1.2 Ground Rules and Expectations" through "Expectations"

**Activity Instructions:**

1. Ask participants what rules they think we should have (5 min)
2. Present the established rules and consequences (5 min)
3. Present expectations and get group agreement (3 min)

**Facilitator Notes:**

* Start with participant input to get buy-in
* Be clear about consequences, especially for lateness and cheating
* Emphasize the collaborative nature of expectations
* Post ground rules visibly in the training room

**Speaker Notes:** "Before we dive into content, let's establish how we'll work together. What ground rules do you think we should have for this training?"

**Key Messages:**

* Professional behavior is expected from everyone
* Training success depends on everyone's participation
* Respect and inclusivity are fundamental
* Feedback helps improve the training experience

### 1.3 Training Objectives (10 minutes)

**Slides:** "1.3 Training Objectives" and objectives list

**Facilitator Notes:**

* Read through each objective clearly
* Connect objectives to participants' work roles
* Explain how objectives will be assessed
* Encourage questions about expectations

**Speaker Notes:** "By the end of this training, you'll be able to accomplish these key objectives. Let's look at each one and how it relates to your role in the field."

**Key Messages:**

* Objectives are specific and measurable
* All objectives must be met for certification
* Objectives directly relate to field work success

### 1.4 Malaria Context (25 minutes)

**Slides:** "1.4 Malaria Context" through "Malaria Treatment"

**Content Flow:**

1. What is malaria? (5 min)
2. Severe vs uncomplicated malaria (5 min)
3. Global epidemiological situation (3 min)
4. Country-specific situation (5 min)
5. Prevention strategies (4 min)
6. Diagnosis and treatment (3 min)

**Facilitator Notes:**

* Update slides with current country-specific data before training
* Use visuals effectively, especially the malaria transmission cycle
* Connect to participants' personal experiences with malaria
* Emphasize the "Test, Treat, Track" policy

**Interactive Element:**

* Ask "Have you ever had malaria? What treatment did you receive?" during treatment section

**Speaker Notes:** "Understanding malaria is crucial for this work. Many of you probably have personal experience with malaria - let's build on that knowledge."

**Key Messages:**

* Malaria remains a major health problem globally and locally
* Proper diagnosis and treatment are critical
* ACTs are the first-line treatment for uncomplicated malaria
* Private sector plays important role in treatment provision

### 1.5 ACTwatch Lite Overview (15 minutes)

**Slides:** "1.5 ACTwatch Lite Overview" through "Key Themes"

**Content Flow:**

1. ACTwatch background and importance (5 min)
2. ACTwatch Lite as streamlined approach (3 min)
3. Why this country was selected (3 min)
4. Study components and methods (4 min)

**Facilitator Notes:**

* Customize country-specific information before training
* Update study design details for current implementation
* Emphasize how this research informs policy decisions
* Connect to National Malaria Strategic Plan if applicable

**Speaker Notes:** "ACTwatch has been providing crucial market data for over 15 years. This Lite version gives us rapid, actionable information to help improve malaria treatment access."

**Key Messages:**

* ACTwatch data directly informs policy and program decisions
* This study focuses specifically on private sector markets
* Results will be available quickly to inform decision-making
* Participants are contributing to important public health research

**Wrap-up and Q&A (5 minutes)**

**Facilitator Notes:**

* Summarize key points from the session
* Preview next module briefly
* Address any remaining questions
* Ensure participants are clear on logistics for next session

**Key Messages:**

* Strong foundation has been established for technical training
* Everyone's role is important for study success
* Questions and engagement are always welcome

**Training Tips for Facilitators:**

**Before the Session:**

* **Country Customization:** Update all placeholder slides with current country data
* **Material Preparation:** Print agendas, registration sheets, and pre-tests
* **Room Setup:** Arrange for comfortable seating and good visibility
* **Technology Check:** Test presentation equipment and have backups ready

**During the Session:**

* **Energy Management:** Keep pace brisk but allow for questions
* **Cultural Sensitivity:** Use local examples and respect cultural norms
* **Engagement:** Use participant names frequently once introduced
* **Time Management:** Monitor timing closely - this sets expectations for entire training

**Common Challenges:**

* **Late Arrivals:** Have a plan for catching up latecomers without disrupting flow
* **Mixed Experience Levels:** Acknowledge different backgrounds without making anyone feel inadequate
* **Technical Issues:** Have low-tech backup plans for all activities
* **Language Barriers:** Speak clearly and check for understanding frequently

**Pre-Session Checklist:**

* All country-specific data updated in slides
* Registration materials prepared
* Name tags/tent cards ready
* Pre-test and answer key prepared
* Printed agendas available
* Room arranged for interaction
* Flip chart and markers available
* Backup plans prepared for technical issues

**Success Indicators:**

* All participants actively engaged in introductions
* Ground rules clearly understood and agreed upon
* Pre-test completed without issues
* Participants can articulate training objectives
* Questions indicate engagement with malaria context
* Clear understanding of ACTwatch study purpose

## Module 2: Qualitative Data Collection Overview

**Duration:** 1.5-2 hours  
**Materials Needed:** Presentation slides, flip chart paper, markers

**Overview**

This session introduces participants to qualitative interviewing fundamentals, focusing on the three core skills essential for conducting effective in-depth interviews: building rapport, active listening, and probing techniques. The session is highly interactive with multiple group activities and practice opportunities.

**Detailed Session Plan**

**Opening (10 minutes)**

**Facilitator Notes:**

* Welcome participants and introduce yourself
* Emphasize that this module should be adapted based on participants' experience level
* Set expectations for interactive participation
* Explain that the participant is the expert in IDIs, not the interviewer

**Key Messages:**

* This training is designed to be flexible based on your experience
* We'll focus on practical skills you can use immediately
* Active participation is essential for learning

**Activity 1: What are Qualitative Interviews? (5-10 minutes)**

**Slides:** "Activity: Qualitative Interviews" through "What is a Qualitative Interview?"

**Facilitator Notes:**

* Start with the question slide and let participants brainstorm (2-3 min)
* Capture responses on flip chart
* Present the key characteristics, building on their responses
* Emphasize conversation-like nature and that participant is the expert

**Speaker Notes:** "Let's start by hearing from you. When I say 'qualitative interview,' what comes to mind? Don't worry about being right or wrong - I want to hear your thoughts."

**Key Messages:**

* Qualitative interviews are conversations with a purpose
* The participant is the expert on their own experience
* We're seeking rich, detailed information

**Getting Rich Information (5-10 minutes)**

**Slides:** "Getting Rich Information"

**Facilitator Notes:**

* Ask participants what they think "rich information" means before showing slide
* Use the hexagon visual to discuss the interconnected nature of these skills
* Emphasize that making participants feel safe to be critical is important

**Speaker Notes:** "Rich information means detailed responses with lots of context. Notice how these skills work together - you can't really have good rapport without active listening, and you can't probe effectively without both."

**Activity 2: Key Elements of Interviewing Skills (5-10 minutes)**

**Slides:** "Activity" through "Interviewing Skills"

**Facilitator Notes:**

* Collect responses and write on flip chart
* Present the three core skills with visual icons
* Connect their responses to the three main categories

**Key Messages:**

* These three skills form the foundation of good interviewing
* All three work together - you can't do one without the others

**Building Rapport Deep Dive (10-15 minutes)**

**Slides:** "Activity: What are some ways to build rapport" through "Building Rapport"

**Activity Instructions:**

1. Small group brainstorm (2-3 min)
2. Present best practices (5 min)
3. Discussion and questions (5 min)

**Facilitator Notes:**

* Emphasize that first impressions matter greatly
* Discuss cultural considerations for eye contact and positioning
* Role-play examples if time permits
* Address any concerns about power dynamics with participants

**Key Messages:**

* Rapport building starts before you speak
* Equal footing positioning is crucial
* Respect and genuine interest are fundamental

**Active Listening Deep Dive (10-15 minutes)**

**Slides:** "Activity: What are some strategies" through "Verify Unclear Responses"

**Activity Instructions:**

1. Brainstorm active listening strategies (2-3 min)
2. Present comprehensive techniques (5 min)
3. Practice activity with unclear response examples (5 min)

**Facilitator Notes:**

* Emphasize that listening is a skill that requires practice
* Discuss the importance of not making assumptions
* Practice the verification phrases with real examples
* Address the challenge of taking notes while maintaining eye contact

**Speaker Notes:** "Active listening is harder than it sounds. Our natural tendency is to start thinking about our next question while someone is talking. We need to train ourselves to truly hear what's being said."

**Key Messages:**

* Listening is an active skill that requires practice
* Verification prevents misunderstandings
* Taking notes shouldn't interfere with connection

**Probing Deep Dive (30 minutes)**

**Slides:** "Activity: What are probes?" through "Probing Practice"

**Activity Instructions:**

1. Define probes brainstorm (2-3 min)
2. Present probing types and examples (5-10 min)
3. Practice exercise with cooperation and pricing scenarios (15 min)
4. Debrief and discuss challenging probing situations (5-10 min)

**Facilitator Notes:**

* Distinguish between direct and indirect probes clearly
* Emphasize that probes should feel natural, not robotic
* For practice exercise (“Probing practice” slide), have participants work in pairs
  + Circulate during practice to provide individual feedback
  + Address when to stop probing (reading participant cues)

**Practice Exercise Facilitation:**

* Divide into pairs
* One person reads the first scenario, the other practices probing, then swap roles for the second scenario
  + Sample probes for cooperation question: "Can you tell me more about what 'some' means? What types of cooperation? How often does this happen?"
  + Sample probes for pricing: "What percentage markup do you typically add? How do you decide on that amount? Does it vary by product?"
* Reconvene as a full group and discuss what worked and what did not

**Key Messages:**

* Probing gets the rich detail we need
* Balance following the guide with natural conversation flow
* Know when to stop probing (participant comfort, time, relevance)

**Wrap-up and Q&A (15 minutes)**

**Facilitator Notes:**

* Summarize the three core skills
* Ask participants which skill they think will be most challenging
* Address any remaining questions
* Preview next session if applicable
* Distribute any handouts or reference materials

**Key Messages:**

* These skills improve with practice
* Focus on making the participant comfortable and heard
* Quality of information depends on your interviewing skills

**Training Tips for Facilitators:**

* **Energy Management:** This is a long session - use activities to maintain engagement
* **Cultural Sensitivity:** Adapt examples and scenarios to local context
* **Experience Levels:** Be prepared to spend more or less time on basics depending on participant experience
* **Practice Focus:** Emphasize hands-on practice over theory
* **Real Examples:** Use examples relevant to antimalarial/pharmacy context when possible

## Module 3: In-Depth Interviews (IDI)

**Duration:** 1.5 hours  
**Materials Needed:** Sample consent forms, recording equipment, interview protocols, checklists

**Overview**

This session provides comprehensive training on IDI methodology, protocol implementation, and practical preparation. It covers the complete interview process from preparation through post-interview procedures, with emphasis on real-world application in ACTwatch research contexts.

**Detailed Session Plan**

**Opening & IDI Overview (15 minutes)**

**Slides:** Title slide through "IDI Outcomes"

**Facilitator Notes:**

* Begin with definition and characteristics
* Emphasize semi-structured format used in ACTwatch
* Connect to previous session on qualitative methods
* Discuss how IDIs differ from quantitative surveys

**Speaker Notes:** "Now that we've covered interviewing skills, let's talk about how to conduct a complete in-depth interview. IDIs are different from surveys - we're not just collecting answers, we're exploring experiences and perspectives."

**Key Messages:**

* IDIs are structured conversations with specific aims
* We use semi-structured format for consistency while allowing flexibility
* Focus is on participant's experiences and meanings

**IDI Protocol Overview (25 minutes)**

**Slides:** "IDI Protocol" (3 slides)

**Facilitator Notes:**

* Walk through each protocol step systematically
* Emphasize the importance of each phase
* Discuss informed consent procedures thoroughly
* Address questions about adapting to conversation flow

**Key Messages:**

* Protocol provides structure while maintaining flexibility
* Informed consent is critical and must be genuine
* Warm-up questions set the tone for the entire interview

**Recording Procedures (20 minutes)**

**Slides:** "Recording - Before the Interview" and "Recording - End of Interview"

**Practical Demonstration:**

* Show actual recording equipment
* Demonstrate proper placement and testing
* Practice stating interview information on recording
* Discuss backup procedures

**Facilitator Notes:**

* Hands-on practice with equipment is essential
* Emphasize the importance of testing before each interview
* Discuss what to do if equipment fails during interview
* Address participant concerns about recording

**Key Messages:**

* Technical preparation prevents problems during interviews
* Always have backup recording method
* Monitor recording throughout interview

**Interviewer Readiness Checklist (25 minutes)**

**Slides:** "Interviewer Readiness Checklist" sections

**Activity Instructions:**

1. Review checklist sections (10 min)
2. Discuss common preparation challenges (15 min)

**Facilitator Notes:**

* Go through checklist systematically
* Have participants practice with actual materials
* Discuss real scenarios they might encounter
* Emphasize that preparation reduces stress and improves quality

**Key Messages:**

* Thorough preparation is essential for success
* Checklists prevent forgotten steps
* Good preparation shows respect for participants

## Module 4: Practice Interviews

**Duration:** Suggested 2-4 hours; adjust based on time allowed/ specific agenda

**Materials Needed:** Printed interview guides, printed practice evaluation forms, recording equipment, pens

**Facilitator Notes:**

* Provide an overview of the session
* Conduct a mock interview for the participants to watch and provide feedback on (between two facilitators if possible to better display different techniques or issues; if not possible, have facilitator act as interviewer and select a volunteer participant to act as the respondent)
* After the mock interview and discussion, step through the interview guide question by question, addressing questions/uncertainty as you go
* When ready to start the practice interviews:
  + Go over the evaluation checklist for participants to complete at the end of each practice round
  + Set expectations for feedback and learning; emphasize that all feedback should be constructive
  + Have participants pair off and alternate between being interviewer and participant
  + Facilitators should circulate through the room during the practice interviews to provide guidance, feedback, and clarification; be sure to observe each trainee acting as interviewer at least once

**Training Tips for Facilitators:**

* **Hands-on Focus:** Prioritize practical skills over theoretical knowledge
* **Equipment Familiarity:** Ensure all participants are comfortable with recording equipment
* **Flexibility:** Adapt timing based on participant questions and needs

## Module 5: Transcription, Translation & Data Management

**Duration:** 2 hours  
**Participants:** Transcribers and data management team  
**Materials Needed:** Sample audio files of interview snippets (facilitators to create before session if need be), transcription software (if using)

**Overview**

This session covers the complete post-interview data management process, including transcription procedures, quality assurance, translation considerations, and secure data storage practices. It emphasizes accuracy, consistency, and confidentiality throughout the data handling process.

**Detailed Session Plan**

**Transcription Process Overview (15 minutes)**

**Slides:** Title slides through "Transcription/Translation Objectives"

**Facilitator Notes:**

* Introduce the importance of accurate transcription for analysis
* Connect transcription quality to research validity
* Set expectations for detailed, time-intensive work

**Key Messages:**

* Transcription is a critical research step, not just administrative work
* Accuracy in transcription directly affects research quality
* This process requires significant time and attention to detail

**Step-by-Step Transcription Process (45 minutes)**

**Slides:** "Step 1: Preparation" through "Step 6: Finalization"

**Activity Instructions:**

1. Review each step systematically (30 min)
2. Practice exercise with sample audio (10 min)
3. Discuss challenges and solutions (5 min)

**Facilitator Notes:**

* Demonstrate transcription software if using specific tools
* Show examples of proper formatting for interjections and nonverbal cues
* Emphasize verbatim transcription including grammatical errors
* Practice with short audio sample if available

**Key Teaching Points:**

* **Step 1:** Proper equipment setup prevents fatigue and errors
* **Step 2:** Verbatim transcription captures authentic voice
* **Step 3:** Review process is essential for accuracy
* **Step 5:** Quality control through spot checks ensures consistency
* **Step 6:** Secure storage protects participant confidentiality

**Speaker Notes:** "Remember, we transcribe exactly what people say, including 'um,' 'uh,' and grammatical errors. This preserves the authentic voice of the participant and can be important for analysis."

**Quality Assurance Procedures (5-10 minutes)**

**Slides:** Verification and Finalization steps (1 slide)

**Facilitator Notes:**

* Explain the 10% spot check procedure (how team leads/supervisors will review 10% of their transcripts for accuracy/completeness)
* Discuss what constitutes "high levels of issues"

**Key Messages:**

* Quality control is built into the process, not added afterward
* Spot checks help maintain standards across all transcribers

**Data Management Overview (25 minutes)**

**Slides:** "Data Management Overview" through "Data Storage and Security"

**Facilitator Notes:**

* Connect each data management step to research quality
* Emphasize the ethical responsibility of protecting participant data
* Discuss legal and institutional requirements
* Address team member roles and responsibilities

**Key Messages:**

* Data management protects both participants and research integrity
* Everyone handling data has ethical responsibilities
* Proper procedures prevent data loss and breaches

**File Organization Systems (5-10 minutes)**

**Slides:** "Data Labeling" and "Example Folder Structure"

**Practical Exercise:**

1. Show example of good file naming (5 min)
2. Review folder structure setup (5 min)
   1. The team leads/supervisors should have set up a draft folder structure already to go over during this session

**Facilitator Notes:**

* Use actual examples relevant to your research context
* Have participants practice with realistic facility and location names
* Emphasize consistency in naming conventions
* Show how good organization saves time during analysis

**Sample Practice File Naming Scenarios:**

* Interview in Lagos State, Ikeja District, Facility ID 789, conducted March 15, 2025
* Interview in Kano State, Kano District, Facility ID 456, conducted April 2, 2025

**Wrap-up and Quality Standards (10 minutes)**

**Facilitator Notes:**

* Review key quality standards and expectations
* Provide contact information for ongoing support
* Schedule any follow-up training or check-ins
* Address final questions

**Key Messages:**

* Quality transcription and data management are essential research skills
* Support is available for questions and challenges
* Consistency across the team is crucial for research validity