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GUIDELINES TO FOCUS GROUP

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Valorização Intergeracional
e Desenvolvimento Activo



Executive summary

This document contains the methodological and operative directions necessary to each partner in order to end the first phase of the Search Action of our AMISL project. To this first phase was consecrated the document you received in February, entitled “GUIDELINES TO THE FIRST STAGE OF ACTION RESEARCH”. The present document, will often make reference to the aforesaid Guidelines, which constitute its premises.

The instrument of qualitative search that we will introduce here is the Focus Group. The Focus Group has been chosen as the more appropriated instrument during our first phase of Search Action, in which small local groups in Rome, Praga, Oporto and Salonicco shall help us to draw up the instrument for the appraisal of the services, the survey of the implicit knowledge and the analysis of the formative needs that we will test during the next year.

As you will notice, the document that we subject you is very simple. We are aware in fact that many of you, or all of you, already know the methodology of the Focus Group. Therefore, the only aim we want to achieve is to obtain an homogeneity in the method between all the participants to the search, which homogeneity is fundamental in order to guarantee the comparison of the final results.

If however someone needs a further widening of the matter, please feel free to contact us at amisl.irsm@gmail.com.

In this document you will find a definition of the Focus Group and of the role that it holds in our project, a definition of the main aims of the search which a Focus Group can acquit to and some directions relative to its implementation and its management. We suggest you to read with particular attention the paragraph named “FG implementation”, that contains the concrete directions above the tasks awaited by each local group and by the respective investigator coordinator within the project.

Attached to the document, you will find **4 cards, relative to the first four focus groups** that we will have to implement in our centers, and that will be necessary to you, both in order to plan your job, that in order to guarantee the necessary homogeneity in the search which shall be activated in contexts and territories very different one from another.

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Definition of Focus group and its role in our project

The focus group (Hereinafter FG) is a characteristic instrument of qualitative search. We can define the FG like a “group interview”, or like an observation made upon a group of subjects. Within our project, the FG has been chosen like the more suitable instrument in our first phase of Search Action, in which small local groups in Rome, Praga, Oporto and Salonicco shall help us to draw up the instrument for the appraisal of the services, the survey of the tacit knowledge and analysis of the formative needs that we will test during next year.

Therefore from the FG shall emerge a number of information and definitions useful to the appraisal of a certain service and of who works in it. These information will regard:

- ✓ the competences that an operator must possess, the general knowledge, the operative skills and the personality;
- ✓ the pointers (indicators) and the instruments for the survey of the aforesaid competences;
- ✓ the characterization of the main dimensions and sub-dimensions that concur to estimate the quality of a service;
- ✓ the characterization of the pointers (indicators) of the dimensions and sub-dimensions;
- ✓ the choice of the best self evaluation methodology.

As a matter of fact the FG is at the same time an instrument of observation and of social interaction, able to modify the praxes and the point of view of who is involved in it. It is therefore completely homogenous to the methodology of Search Action that we have chosen to adopt in our project (see previous document “GUIDELINES TO THE FIRST STAGE OF ACTION RESEARCH”). In fact thanks to the presence of a moderator (the “investigator coordinator” as we had defined it in the previous document, page 14), that stimulates the discussion, and of an observer, it’s pursued the aim to start a debate upon a pre-established subject in order to make emerge the opinions and the spontaneous points of view of the participants. All it will be faithfully recorded on audio or audio support/video (in our case a digital recorder tape), and it will become informative material useful because bearer of the other people's opinions.

Aims of the FG

The FC it’s an exploratory analysis that through the group discussion, allows to strengthen or to review the image of the truth owned by the investigators and by the group.

It can assume the role of “pilot survey” trying to control the complexity of the questions of a questionnaire or of another instrument of social search, often in order to develop the aforesaid instrument.

It can complete other survey methods, because, by adding the human element and the direct comparison between different opinions, it helps in the interpretations of the results obtained with other search methods

It makes possible an immediate feedback, since the group comparison helps the emerging of important aspects that a individual interview would never reveal, remarkably reducing the influence of the investigator on the interviewed person.

The interviewer or moderator

The moderator can assume two types of attitude: not directive or directive. In the first case (proper for exploratory analyses or inter-subjective comparisons), he will just define little cues of discussion and intervenes only when the situation is flagging trying to revive the debate. In the second case the interviewer participates actively directing the interview and having a precise list of topics.

We will propose both the two figures, with reference to the focus that we have to manage: in some of them the moderator will propose a structured grill with a huge number of questions, and will try to keep the debate on the points of the grill; in others the moderator will use short questions to help, the participants to express themselves without excessive constrictions on aspects that concern them from near .

In both situations, however, who plays this role must try to be sensitive to the groups dynamics, interpreting the influences of pre existing relations between the members, and external influences; he/she must inspire confidence and have sense of humour in order to create a relaxed atmosphere; he/she must be easygoing, have good memory, ability to listen; he/she does not have to speak too much, he/she does not have to insist with its points of view nor try to share them with other people; he/she must maintain the control of the group; he/she must know when to stimulate the debate or when to let it run alone; he/she must know when to balance the debate while encouraging who takes little part to it and limiting who intervenes more often.

The observer

This figure plays a very important role inside the dynamics of the FG. He is in fact the one who helps the moderator, recording on audio support the debate and also recording it on paper support, by means of simple notes, his own impressions with reference to the emotional atmosphere that characterizes the

discussion. Moreover, considering the frequent risk to change the subject of the discussion, he shall recall the moderator on the original topic. It has moreover the task, most important in our plan, to transcribe the information from record to paper, at the end of the FG. The peculiar linguistic needs of our project impose us moreover to translate the transcription also in English.

Practical suggestions

As we said, the moderator chooses with discretionary power, to direct the debate with one more or less wide number of topics. The debate may be started in a room or a classroom, (normally the groups are composed by 8-12 persons, we suggest groups of approximately 10, 12 persons). The questions that you will find in the cards enclosed to this document will be general ones, avoiding to directly interrogate the participants with reference to their personal situation, but concentrating on their opinions.

Some practical indications on the conduction of a FG:

- the language must be clear and comprehensible to all;
- at the end of the debate it is useful to reassume it all and ask if something has been forgotten; the order of the questions must be logical and to move from the superficial to the deepest one: the first questions frames the problem, the successive ones come down in depth of the problem;
- it must prevent other participants to the debate to jump from a argument to another and to give answers before the time;
- there are not right or wrong answers, pay attention not to give this feeling: we are looking for opinions, not for solutions.

FG Implementation

Please read carefully this paragraph, that contains the concrete indications upon the tasks attended from each local group of the project and their investigator coordinator:

- ✓ **construction of the search groups: We remember you that:**
 - every search group will be composed by 10-12 persons plus the coordinator-moderator and the observer;
 - the group shall be interdisciplinary and, if possible, shall possess different organizational levels (managing, coordinators, executive levels);

- if you still have doubts on the composition of the groups, read again the document “GUIDELINES TO THE FIRST STAGE OF ACTION RESEARCH” paragraph 3,5, page 17, or contact the staff of coordinators of Saint Michele Institute(amisl.irsm@gmail.com).

✓ **FG preparation:**

- spread the calendar of your eight encounters (one proposal has been sent you in the previous mail of 14 March 2008) and share it with the participants to the focus;
- time by time, prepare the focus basing on the cards enclosed to the present document. Cards are just conventional schemes, and do not mean in any way to limit your initiative, but in some way they guarantee a minimum of homogeneity to the search on the various territories and contexts in which it will be implemented.

✓ **FG Implementation:**

- every encounter will last maximum three hours. The figure of a moderator (that coincides with the local coordinator of the search) will be fundamental, and is warmly advised also the presence of an observer, in order to acquit to the aforesaid functions. The necessary materials, will be paper and pen in order to take note and record the debate (digital system or cassette) in order to collect the audio trace of the FG.

✓ **actions next to the implementation: at the end of each FG, it will be necessary:**

- a) to transcribe the recording of the encounter and to transcribe it in format word;
- b) to translate this document from the original language (Greek, Czech, Italian and Portuguese) to the project language, which is English;
- c) to spread a short relation (one page) containing the observations upon the emotional atmosphere of the FG and other annotations on what seems to be important;
- d) to send the all via mail to amisl.irsm@gmail.com or, inserting the materials on the appropriate web section www.amisl.org that will be ready for the date in which you will begin the FG.

Great job to all!

ANNEX 1 – Card for the Focus groups N. 1 and 2

Introduction - Card for the focus groups management and for the evaluation of the operators general competences – Focus 1 and 2

Considering the wideness and the complexity of the topic, we suggest to proceed to the **focus management** by means of:

1.

-A **definition of the functions of the service and of the supplied activities** (both by means of short interviews directed to the superintendent and to coordinators and both through use of institutive rules and regulations). Considering the outcomes of the interviews and the analysis of the rules and regulations, it may be adopted the following scheme:

Service example.: “Rest House for elderly people” or “Assisted Sanitary Residence” or “Diurnal Center”	
Developed Functions	Supplied Activities
Example: (Diurnal Center) half residential Structure aimed to supply acceptance to old persons in conditions of self-sufficiency or with a reduced autonomy mostly because of physical sickness, who they need supervision, protection, support and aid in the development of some of the activities of daily life.	Example: -screening of the question, -acceptance or shipment to other services, -activity of socialization, -activity of attendance,...
Example: (Rest House) Structure of residential type, managed from private or public bodies, aimed to supply assistance to old self-sufficient or partially self-sufficient people , who may not be assisted by their families and who, at the same time, can't live alone. -	Example: -hotel attendance -social -sanitary attendance -diurnal and nocturnal medical nursing -general and specialistic attendance -social assistance -rehabilitative activities -recreational, cultural and occupational activities... -

Such a job will be useful not only for the realization of focus N. 1 but also, later on, when, during the application and testing of the self-evaluation instrument, the groups will proceed to the drawing-up of the documents relative to the identity (1. definition of the service, 2. mission, 3. vision, 4. operative principles).

2. The individuation of the professional figures (always through the interviews) who work in the service and of the activities developed by each professional figure. Also in this case, it may be adopted, as an example, the following scheme:

Professional figures	number	activities
General Medician		
Geriatrician		
Phisiatrist		
Psychologist		
Social Assistants		
Teachers		
Phisioterapis		
Occupazionali Therapists		
Social-Health Operators		
Assistants		
Entertainment Organizers		
...		
...		

3. The supply of a **questionnaire of survey of the formative needs** (please find enclosed instrument) to those who will participate to the focus.

Focus Management

Constitution of 2 groups

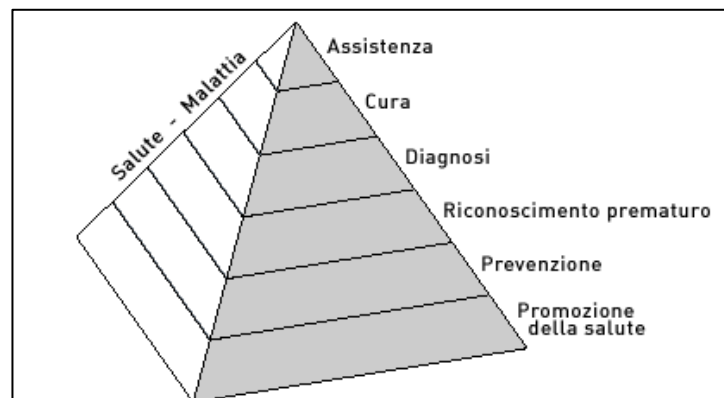
FIRST GROUP CARD - FOCUS N. 1

The **1st group** will be engaged on following topics:

- a. Survey, analysis and sharing of the **functions** carried out by the service. The group will carry out,
 - a.1 a rapid reading/analysis of the scheme adopted during the preparation phase, and,
 - a.2 it will proceed therefore to an appraisal, that it may be stimulated by the following questions

- with reference to the functions carried out by the Service....are those functions the ones really indicated in the adopted grid?
- otherwise, which are the differences?
- the activities indicated in grid are effectively those distributed by the Service "...?"

- b. The appraisal job will continue using one reproduction of the Pyramid of Health as defined by the WHO (World Health Organization)



Health – Sickness

Assistance

Cure

Diagnosis

Untimely recognition

Prevention

Health Promotion

The participants shall try to recognize as aims of the Service the 6 ranges characterized by the WHO in order to describe the fundamental aspects related with the **quality of life**:

- physical range,
- psychological range,
- level of independence,
- social relationships,
- environment,
- personal beliefs/spirituality.

The aspects that will be recognized as pursued/realized by the Service shall be represented in the Pyramid with the right position. The questions on which each group shall reflect may be following:

- Does the Service in which we operate really succeed to work in the direction characterized by the WHO?
- Otherwise, why not? What is deemed necessary to reach our aim?
- Do we succeed to pick the real needs and the real potentialities of the old customers to which our Service is turned? Which are the best modalities in order to reach this result?

FIRST GROUP CARD - FOCUS N. 2

The **second group** shall work on the following topics:

a. Analysis of the professional profiles operating inside the service through:

a.1 one reading/analysis of the adopted grid,

a.2 one rapid appraisal of the data. The questions-stimulus may be:

- The professional profiles present in the Service are sufficient and useful?
- Would you suggest any changes?
- If yes, of that kind?

b. Appraisal of the competences of the operators:

b.1 Definition of the term “competence”: rapid brain storming in order to provide one shared definition of the term “competence”;

b.2 Characterization of the competences necessary to the development of the service in two steps:

-rapid reading of the cards of survey of the needs that have been fill in (is advised to make reference to the cards filled in by both groups),

-shared and rational redevelopment of the **reference scheme** :

Theoretical Knowledge	Tecnical Abilities	Social and Relational Abilities

b.3 Appraisal of the competences inner to the Service –

-Redevelopment, inside the adopted scheme, of the competences owned by each operator (own points of strenght)

Theoretical Knowledge	Tecnical Abilities	Social and Relational Abilities

Redevelopment, of the competences of the work group. Questions-stimulus:

- It may be possible to succeed, inside the Service, the transmission of the knowledge, and of the abilities between the single operators? Through which modalities?
- Are there other possible modalities, that could be effective? Which ones?
- It is possible to acquire new acquaintances or to improve the already existing ones through the relationship with the old people? Which type of acquaintances can be acquired/improved? Through which modalities it may be possible this transmission?

- Drawing-upof the Pyramid, where to place the “bricks” of the competences necessary in order to provide a high quality of supply by the Service.

- Also for this second group we suggest to use the Health Promotion Pyramid as defined by the WHO aiming to help the participants to characterize/place:

- ✓ the competences owned by the Service in its whole(first Pyramid),
- ✓ the competences to develop more than others(second Pyramid).

The Focus will end with a rapid comparison between the two Pyramids.

RETURN

We deem necessary to complete our job with a **collective final encounter**, where both groups will be involved, in order to realize a unitary return of the job carried out by each group. In this way, it will be possible to activate a process of Sensemaking, that is one construction through a retrospective process: “to speak about the truth as of a continuous construction that takes shape when the persons involved in the debate, give sense in a retrospective way, to the situations in which they are involved and in what they have created themselves”.

We suggest to proceed in the following way:

- Short illustration of the job carried out from each group,
- collective comparison between the Pyramid of the Functions of the Service and the Pyramid of the Competences (composed by the superimposition of the 2 Pyramids defined from the Second group),
- qualitative appraisal; questions-stimulus:

- Do we recognize ourselves in what we have elaborated? Did we catch the truth of our Service?
- Do we think that something is missing? How can we intervene? Do we need updating an forming courses? What type of courses?

ANNEX 2 – Cards for the Focus groups N. 3 and 4

Card for dimension and sub dimension of the services analysis – Focus 3

Definitions

In order to manage this FG it is essential to share a common definition of “dimensions” and “subdimensions” of appraisal of the quality of a service, as mentioned in the project. The dimensions and the sub-dimensions are the different ranges that compose a service. Each range can be analyzed by dividing it in smaller ranges. To make an example, a service that supplies residential attendance to old people, may be analyzed by dividing it in a certain number of dimensions:

1. **acceptance of the old person;**
2. **staff management;**
3. **tipology of the supplied services;**
4. **claims management;**
5. **etc. etc.**

Each dimension may be divided in smaller sub-dimensions, as an example, with reference to the first two items of the previous scheme, we could have the following sub-dimensions, each linked to the relative characterized dimension above mentioned:

1. acceptance of the old person

management of the admittance question

procedures for the introduction of the old person in the community/residence/rest house

information of introduction supplied to the host

information of introduction rendered the relatives

2. staff management

management of the turns

continuous staff formation courses

inner coordination and team encounters

management of the communication between colleagues

Obviously the number of dimensions and sub-dimensions that may be characterized during an appraisal search is potentially a wide number. However we will limit our analysis to a reduced number of dimensions of quality, as described in the next paragraph.

FG aims

In this FG, the search groups locally activated shall stress, using the interview grid, the sub-dimension they deem more important, with reference to the following dimensions:

- i) Job methodology with the old customer
- ii) Instrumental equipment (job instruments, subventions aid etc)
- iii) Environment and service structures (spaces fixed for the activities)
- iv) Territorial Network in which the service is inserted

FG Methodology and grid of interview

For each dimension as above characterized we propose the following set of questions to subject to the group of the interviewed persons:

<p>Job methodology with the old customer</p>	<p>1.If you were the leader of the service, how would you draw-up the the individual aims for each of your old customers?</p> <p>2.If you were the leader of the service, how would you check-up the results obtained with each of your old customers?</p> <p>3.If you were the leader of the service, how often would you readapt the initial individual general aims to the specific needs of each of your customers?</p>
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<p>Instrumental equipment (job instruments, subventions, aid etc)</p>	<p>1.To which instruments or aid you could never renounce in your job?</p> <p>2.Which instruments or aid do you use more? 3.How would you manage the supplying of the job instruments and other aid? With which criteria?</p>
<p>Environment and service structures (spaces fixed for the activities)</p>	<p>1.Which main characteristics shall possess the structure that hosts your service, in order to be suitable and comfortable?</p> <p>2.How much can the structure that hosts your service be adapted to the requirements of the old customer, through restructuration activities?</p> <p>3.Try to imagine that your service exists only virtually, and is up to you to decide where to locate it; in which territorial context would you place it? (big cities, small cities, countryside, suburbs historical center, popular quarters, residential quarters...)</p>
<p>Territorial Network in which the service is inserted</p>	<p>1. Which advantages may come to your service by being inserted in a network of other services and institutions?</p> <p>2. Which problems would have your service if it were isolated and not inserted in a territorial network?</p>

Times and instruments

The whole FG should not last more than two hours. For its realization it will be sufficient an audio recorder to record all the debate. Moreover it may be useful a video support (blackboard, poster or video floodlight and slides) on which will be visualized, time by time, the questions proposed to the group. This may help the persons to follow the chosen subject without wandering from the subject.

Card for dimension and sub dimension of the services analysis – Focus 4

Definitions

In order to manage this FG it is essential to share a common definition of “dimensions” and “subdimensions” of appraisal of the quality of a service, as mentioned in the project. The dimensions are the different ranges that compose a service. Each range can be analyzed by dividing it in smaller ranges. To make an example, a service that supplies residential attendance to old people, may be analyzed by dividing it in a certain number of dimensions:

6. **acceptance of the old person;**
7. **staff management;**
8. **tipology of the supplied services;**
9. **claims management;**
10. **etc. etc.**

Each dimension may be divided in smaller sub-dimensions, as an example, with reference to the first two items of the previous list, we could have the following sub-dimensions, each linked to the relative characterized dimension above mentioned:

1. acceptance of the old person

management of the admittance question

procedures for the introduction of the old person in the community/residence/rest house

information relative to the aforesaid introduction supplied to the host

information relative to the aforesaid introduction rendered to the relatives

2. staff management

management of the turns

continuous formation courses

inner coordination and team encounters

management of the communication between colleagues

Obviously the number of dimensions and sub-dimensions that may be characterized during an appraisal search is potentially a wide number. However we will limit our analysis to a reduced number of dimensions of quality, as described in the next paragraph.

FG aims

In this FG, the search groups locally activated, shall stress, using the interview grid, the sub-dimension they deem more important, with reference to the following dimensions:

- v) **Acceptance of the old customer**
- vi) **Staff Management**
- vii) **Management of the coordination of the team encounters**
- viii) **Listening of the old customer**

FG Methodology and grid of interview

For each dimension as above characterized we propose the following set of questions to subject to the group of the interviewed persons:

<p>Acceptance of the old customer</p>	<p>1. Which functions should develop a good service for the acceptance of the elderly people?</p> <p>2. If you were the manager of a service how would you arrange the procedures for the introduction and first access of the elderly people to the service?</p>
<p>Staff Management</p>	<p>1. On your opinion what is to be considered really effective to develop a correct staff management?</p> <p>2. In your experience what really helps you in order to carry out a good job?</p> <p>3. In the daily job how much is relevant the continuous formative courses you've attended to?</p>
<p>Management of the coordination of the team encounters</p>	<p>1. If you were the manager of a service how would you organize the coordination and the staff encounters?</p> <p>2. What sort of activities would you insert in the coordination process and the staff encounters and which ones would you on the other hand exclude?</p>

Listening of the old customer	<ol style="list-style-type: none">1. what do you deem necessary to perform a good listening of the old customer?2. In your experience what makes difficult the listening of the old customer?3. If the listening of the old customer was improved, what would change really in your daily job/activity?
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Times and instruments

The whole FG should not last more than two hours. For its realization it will be sufficient an audio recorder to record all the debate. Moreover it may be useful a video support (blackboard, poster or video floodlight and slides) on which will be visualized, time by time, the questions proposed to the group. This may help the persons to follow the chosen subject without wandering.

ANNEX 3 - Planning of the Search within July 2008

