APPENDIX 5. QUALITATIVE ASSESSMENT TRAINING AGENDA TEMPLATE

Before the orientation or training, the protocol and all data collection tools should be developed. These will be used during the training to ensure a common understanding about the purpose of the assessment and proposed methodology. Consider sharing the protocol and tools with the participants before the training so that they can familiarize themselves with the content and come prepared with questions. There are two different options for training, depending on the data collection team's qualitative experience: (1) a one-day orientation or (2) a three-day training. The three-day training can be scaled back to a two-day training if there are time or budget constraints.

ONE-DAY ORIENTATION

The one-day orientation is for teams who have experience implementing the qualitative data collection methods included in the assessment protocol. The orientation aims to familiarize the data collection team with the purpose of the study, discuss logistics, pilot test the data collection tools, and make any changes, if needed.

Times	Activity	Description
9:00–9:15 a.m.	***Introductions***	Introduce the data collection team and their roles in the assessment.
9:15–9:45 a.m.	***Overview of the program***	Review the overall purpose of the assessment. • Provide background about the reasons for conducting the assessment. • Review the research questions.
10:00–11:00 a.m.	***Summary of data collection methods***	Discuss each data collection method and sampling strategy planned for the assessment.
11:00–11:15 a.m.	***Coffee break***	
11:15 a.m.–12:30 p.m.	***Role play in small groups***	Split into small groups to test the data collection tools. For each tool: • Designate a notetaker, facilitator, and mock participants. • Practice for about 15 minutes. • Discuss what went well and any challenges for 10 minutes. Test the next tool or switch roles. Assessment leads should walk around, observe the role play, and provide feedback.

Times	Activity	Description
12:30–1:00 p.m.	***Discuss logistics to pilot tools in the community after lunch***	Split the data collectors into teams and discuss where each team will practice implementing the data collection tools.
1:00–2:00 p.m.	***Lunch***	
2:00–4:00 p.m.	***Pilot test data collection tools in the community***	Data collection teams practice using the data collection tools in a community near the orientation site. Team members should take turns with different roles to feel comfortable facilitating and taking notes.
4:00–5:00 p.m.	***Debrief about pilot test and update tools***	Data collection teams return to the orientation site. Each team shares its experience for 5–10 minutes depending on the number of teams. Take the second half of the hour to review the data collection tools and discuss any updates based on the pilot.
5:00–5:30 p.m.	***Discuss data collection logistics***	Share the final schedule for data collection and ensure that you have contact information for all members of the data collection team.

THREE-DAY TRAINING

The three-day training is for teams who have limited experience with the qualitative data collection methods included in the assessment protocol. The purpose of the training is to familiarize the data collection team with the purpose of the study, discuss the basics of qualitative data collection, familiarize the team with each data collection method, discuss logistics, pilot test the data collection tools, and make any changes, if needed. The draft agenda includes time to practice four methods. These should be switched to the methods that you plan to include in your assessment.

Day 1

Times	Activity	Description
9:00–9:15 a.m.	***Introductions***	Introduce the data collection team and their roles in the assessment.
9:15–10:00 a.m.	***Overview of the program***	Review the overall purpose of the assessment. • Provide background about the reasons for conducting the assessment. • Review the research questions.

Times	Activity	Description
10:00–11:00 a.m.	***Basics of qualitative data collection***	Discuss what qualitative data collection is. Review the qualitative interviewing tips included in Step 4 of the guide.
11:00–11:15 a.m.	***Coffee break***	
11:15 a.m.–1:00 p.m.	***Present the basics of the qualitative data collection methods included in the assessment***	Provide an overview of each method and the steps involved in implementing the method. The how-to method documents in *Appendix 2* provide an overview of each method and links to additional training resources.
1:00–2:00 p.m.	***Lunch***	
2:00–3:30 p.m.	***Practice qualitative interviewing***	Review the interview guide and discuss any questions. Split into small groups to test the guide. • Designate a notetaker, facilitator, and mock participants. • Practice for about 15 minutes. • Discuss what went well and any challenges for 10 minutes. Switch roles and test the interview guide again. Assessment leads should walk around and observe the role play and provide feedback.
3:30–3:45 p.m.	***Coffee break***	
3:45–4:30 p.m.	***Debrief on mock interviewing***	Bring the group back together and discuss what went well, challenges, and insights from each small group.
4:30–5:00 pm	***Wrap up***	Review the first day of the training and discuss the plan for Day 2.

Day 2

Times	Activity	Description
9:00–9:30 a.m.	***Summary of the previous day***	Review what you went over in the first day of the training and the plan for Day 2.

Times	Activity	Description
9:30–11:00 a.m.	***Practice focus group discussions (FGDs)***	Review the FGD guide and discuss any questions. Split into small groups to test the guide. • Designate a notetaker, facilitator, and mock participants. • Practice for about 15 minutes. • Discuss what went well and any challenges for 10 minutes. Switch roles and test the interview guide again. Assessment leads should walk around and observe the role play and provide feedback.
11:00–11:15 a.m.	***Coffee break***	
11:15–11:45 a.m.	***Debrief on mock FGD***	Reconvene as a large group and discuss what went well, challenges, and insights from each small group.
11:45 a.m.–12:00 p.m.	***Discuss ethical considerations and informed consent***	Provide an overview of the ethical considerations data collectors should keep in mind when conducting qualitative data collection. Discuss the importance of informed consent and role play scenarios of obtaining consent.
1:00–2:00 p.m.	***Lunch***	
2:00–3:30 p.m.	***Practice participatory methods***	Review the steps in conducting the participatory methods selected for the assessment. Split into small groups to test the guide. • Designate a notetaker, facilitator, and mock participants. • Practice for 15 minutes. • Discuss what went well and any challenges for 10 minutes. Switch roles and test the interview guide again. Assessment leads should walk around and observe the role play and provide feedback.
3:30–3:45 p.m.	***Coffee break***	
3:45–4:30 p.m.	***Debrief on participatory methods***	Reconvene as a large group and discuss what went well, challenges, and insights from each small group.
4:30–5:00 p.m.	***Wrap up***	Review the second day of the training and the plan for pilot testing the tools in the community in the morning of Day 3.

Day 3

Times	Activity	Description
9:00 a.m.–1:00 p.m.	***Pilot test data collection tools in the community***	Data collection teams practice using the data collection tools in a community near the orientation site. Team members should take turns with different roles to feel comfortable facilitating and taking notes.
1:00–2:00 p.m.	***Lunch***	
2:00–3:00 p.m.	***Reflect on pilot test and update tools***	Data collection teams return to the orientation site. Each team shares its experience for 5–10 minutes depending on the number of teams. Take the second half of the hour to review the data collection tools and discuss any updates based on the pilot.
3:00–3:30 p.m.	***Discuss data collection logistics***	Share the schedule for the next day and ensure that you have contact information for all members of the data collection team.
3:30–3:45 p.m.	***Coffee break***	
3:45–4:40 p.m.	***Wrap up***	Review the third day of the training and discuss any remaining questions or concerns before leaving for data collection.