

**A Guide for Planning, Organizing, and Managing**

**FOCUS GROUPS**

**By**

**The Puget Sound Consortium for Manufacturing  
Excellence**

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## Foreword

This guide is intended to be a user-friendly introduction to focus groups. It is directed at faculty with information needs who seek to obtain that information themselves. Specifically, this guide explains what a focus group is, why focus groups should be conducted, how to plan them, who should conduct them, and what to do with the information collected. The guide also discusses ethical issues and other considerations when conducting focus groups. In summary, it is a guide for planning, organizing, and managing focus groups.

What is a focus group? A focus group is a method of qualitative data collection. Morgan (p. 1,1998a) explains,

“Focus groups are group interviews. A moderator guides the interview while a small group discusses the topics that the interviewer raises. What the participants in the group say during their discussions are the essential data in focus groups. Typically, there are six to eight participants who come from similar backgrounds, and the moderator is a well-trained professional who works from a predetermined set of discussion topics. Many other variations are possible, however.”

Focus groups are discussions focused on a particular topic and group of participants (Morgan, 1998a). They are conducted to listen and learn from participants. Focus groups involve exploration and discovery of participants' opinions and experiences. They elicit information about the context of participants' opinions and experiences and they allow for depth of information to be elicited and collected.

There are four major reasons why one would conduct a focus group: 1) to identify a problem; 2) for planning to achieve a set of goals; 3) to fine tune the implementation of a plan/project; and 4) to assess and understand what happened during your plan/project to guide future work (Morgan, 1998a). It should be noted that not all purposes are best fulfilled with this method. The question(s) of interest should dictate the method; the method should not be selected before the research question has been identified.

This guide presents the essential steps in planning focus groups, and it describes criteria for selecting moderators to conduct the groups. A brief discussion of the nature of focus group data and its analysis is included as well. Throughout this guide we use the example of the National Science Foundation (NSF)-funded Puget Sound Consortium for Manufacturing Excellence (CME) program to illustrate the focus group method. The CME utilized focus groups to inform the development of recruitment and retention practices for enhancing enrollments in various manufacturing training programs. The process the CME employed can be applied to any discipline such as math, English, automotive, retention, and marketing to name a few. We invite you to adapt the materials (see Appendices) the CME used in conducting its focus groups for use in your projects.

In addition to this guide and the resources listed in the Reference section, you may want to consult a social scientist with focus group expertise or additional printed/online resources on conducting focus groups. Conducting a focus group can be stimulating, informative, and enjoyable. However, it is important to always implement this method in a rigorous and professional manner.

# The Focus Group Process

As stated in the foreword, this guide provides a step-by-step overview of planning, organizing, and managing a focus group. Where appropriate we use the example of the National Science Foundation (NSF)-funded Puget Sound Consortium for Manufacturing Excellence (CME) program to illustrate implementation of the focus group method.

There are four essential steps in conducting focus groups: 1) planning 2) recruiting, 3) moderating, and 4) analysis and reporting (Morgan, 1998b).

## ***I. Planning***

Focus groups require thoughtful advance planning. In planning, one must:

1. Define the research purpose and outcomes
2. Identify the role of the sponsor (who is paying for the research) and other stakeholders
3. Identify personnel and staffing resources
4. Develop a timeline
5. Determine participants
6. Write a question guide
7. Develop a recruitment plan
8. Set locations, dates, and times for focus groups
9. Design the analysis plan
10. Specify contents of the final report

These steps (Morgan, 1998b) are discussed in detail below.

### 1. Defining the Research Purpose and Outcomes

Defining a clear, overall objective for formulating a focus group is important before beginning to work on details such as questions, location, time, and participants. Communicate and clarify the purpose and outcome of the information being sought from the focus group with all stakeholders involved in the research. Stakeholders are individuals or groups who may be affected by the research process or outcomes, and are interested in the findings. Support and understanding from all stakeholders is critical and will ultimately make organizing the focus group(s) easier. Detailed guidance for involving community members in focus group research is provided by Krueger and King (1998).

When the purpose and desired outcomes have been defined and agreed upon by stakeholders, create a purpose statement that reflects what you need to know from the participant group(s).

For example, CME educational programs were having trouble placing students after they graduate and the goal was to find out why. The purpose statement was:

“To determine why industry does not hire graduates from our program. Based on the information and opinions of the focus group participants, develop strategies to address this issue.”

Examine the purpose statement to determine whether a focus group is the most appropriate method of data collection. As stated in the foreword, focus groups are appropriate: 1) to identify a problem; 2) for planning to achieve a set of goals; 3) to fine tune the implementation of a plan/project; and 4) to assess and understand what happened during your plan/project to guide future work (Morgan, 1998a). If your purpose falls within these four categories, proceed with designing the focus group study.

## 2. Identify the role of the sponsor (who is paying for the research) and other stakeholders.

If focus group methodology is appropriate for your research purposes, begin planning the focus groups with the continued involvement of the sponsor and other stakeholders. Determine the extent to which they will be involved. Stakeholder involvement will help you ask the most relevant questions, and organize a focus group that is convenient and interesting for participants. Sometimes the more sponsor and stakeholder involvement the more time it will take to plan the research, as building consensus about the research's purpose and methods can be more challenging when the number of different viewpoints increases. However, the research will likely be more relevant and the findings are more likely to be utilized with greater stakeholder involvement (Krueger & King, 1998).

## 3. Identify personnel and staffing resources

Personnel and staffing resources required will be determined by the size of your focus group study. This document provides guidance for conducting small studies consisting of two to four focus groups. Small studies are characterized by most of the work being conducted in-house with easily available recruitment sources for focus group participants (Morgan, 1998b). Furthermore, small studies do not typically require complex analysis or full transcription of discussion tapes. The final reports of small studies are brief, and sometimes only an oral presentation is required. Small studies can be conducted by two people who share the planning, recruiting, moderating/assisting, analysis, and reporting. When more than one focus group will be conducted for the same topic, a Facilities and Materials Checklist (see Appendix A) helps with the preparation and tracking of each focus group.

Larger focus group studies have at least four focus groups, multiple staff, no ready-made recruitment source, recruitment occurs across several segments or

geographic locations, detailed analysis, and extensive written reports (Morgan, 1998b). These studies typically require substantial assistance from outside experts in focus group methodology.

#### 4. Develop a timeline

Two good rules of thumb are: (1) Allow six to eight weeks of preparation time prior to the focus group meeting; and (2) Create a timeline to help the focus group planner stay on track.

Morgan (1998b) suggests that, for small focus group studies, planning requires 2 weeks, recruiting requires 1½ weeks followed by ½ a week of reminder calls, moderating the groups takes 1 week, and analysis and reporting requires 2 weeks. The duration of each activity is an approximation. Proportionately more time should be anticipated if you are planning to do something you have never done before (35%), if a committee has to approve each stage (20%), and if formal recommendations are required in the analysis and reporting (20%). Appendix B provides a sample timeline for a small focus group study.

#### 5. Determine participants

By clearly defining the purpose and outcomes of the focus group, it is easier to identify who should be invited to participate in the focus group. Generally, a focus group is comprised of six to twelve people (Morgan, 1998b; Stewart & Shamdasani, 1990) who have been qualified in some way through the purpose statement. For example, the CME purpose statement was:

“To determine why industry does not hire graduates from our program. Based on the information and opinions of the focus group participants, develop strategies to address this issue.”

From this statement, industry representatives who make hiring decisions were an appropriate participant group. The CME gained support from industry stakeholders, and they suggested names of possible candidates for the focus group.

Stakeholder involvement in determining the participant group(s) improves the appropriateness of the target population for the research question. Furthermore, stakeholder representatives are often gatekeepers to participant groups, and thus, their cooperation can facilitate participant recruitment by improving access to participants.

#### 6. Write a question guide

When writing your question guide, it is important to allow sufficient time for feedback and revisions (Krueger, 1998b). Once your initial set of questions has been developed, pilot test the questions with the involved stakeholders, other researchers/faculty, and with potential participants. It is not unusual for a

question guide to undergo 6-10 revisions. Focus group questions are not usually revised after data collection has commenced. Questions are kept the same to increase comparability across the groups.

When formulating questions, aim for the questions to be conversational, brief, jargon-free, direct, and focused on participant experience (Krueger, 1998b). Pose one-dimensional questions that ask about one topic at a time (e.g., “What factors keep people from a career in manufacturing?” vs “What factors keep people from careers in manufacturing *and* engineering?”) Also, use open-ended questions that avoid a “yes” or “no” response. Open-ended questions allow participants to determine the direction of the conversation. Asking participants to “think back” is a way of focusing their responses on their own experiences instead of vague generalities. Avoid asking “why” questions, because they encourage an intellectualized/rational response rather than an experiential answer. The CME focus group question guide is presented in Appendix C.

The sequencing of the questions is very important. The sequence must focus the discussion, make sense to the participants, allow the conversation to flow, and give participants an anchor to build their views/opinions (Krueger, 1998b). Questions should funnel from the general to the specific, from positive to negative, and from un-cued (open-ended) to cued (follow-up probes). The first question should be general in nature and could be used as an “ice breaker” to put the participants at ease. The purpose of the focus group is to solicit responses from the hearts and minds of the participants, and take advantage of group dynamics. Ideally, what one participant states about a given topic will generate more ideas and opinions from other participants resulting in new ideas and perspectives.

When writing the question guide, knowing your participants’ limitations is essential. Focus groups should not exceed two hours. This is the physical and psychological limit of most people (Krueger, 1998b). For a two-hour focus group, a maximum of 12 questions is advised. For a one-hour focus group, 5-7 questions are appropriate. Other limitations include cultural and language constraints. In North American culture direct and forthright questions are appropriate. It is important to be aware of, and sensitive to, other cultures’ rules about suitable questions and who is acceptable to be asking and answering questions. Also, if your participants speak English as their second language, it is necessary to respect the limits of their language proficiency and design your questions accordingly, or employ a translator.

## 7. Develop a recruitment plan

The recruitment plan begins with defining the participant target population as described in planning step 5. Next, define segments within the target population that are of particular relevance to your focus group purposes and outcomes. For instance, industry leaders were the target population of interest for the CME focus group. However, it was important to determine what segment of industry leaders would be most informative. It was decided to limit participants to industry



leaders in the Puget Sound area who are more likely to hire CME college graduates than those in other parts of the state or country. Participation eligibility/exclusion criteria are then developed, and then recruitment screening and invitation scripts are written (see Appendix D). The remaining recruitment steps include planning initial contacts with participants, and determining follow-up procedures to ensure attendance. These steps will be discussed in detail below in section *II. Recruiting*.

#### 8. Set locations, dates, and times for focus groups

Before recruiting participants, identify the location, date, and time for the focus groups. Select a location easily accessible to your participants. Based on your stakeholders' input, choose a time of day that will be convenient for the participants. Generally, late afternoon or early evenings are the best time of day for focus groups, and Monday and Tuesday are the best days of the week (Morgan, 1998b). Try to select a location that will be free from distractions and provides a comfortable environment for conversation. For example, the room should not have windows with distracting views, ambient noise should be limited, chairs should be comfortable, electrical outlets should be well placed, and the room should permit a circular seating arrangement.

If your organization has approved providing snacks and/or beverages for the participants, follow the budget procedures or guidelines. If applicable, check with location management regarding rules about food or beverages on-site.

#### 9. Design the analysis plan

The goal of the analysis is to produce a statement of what was found from the discussion(s), and it is driven by the research purpose (Krueger, 1998a). When planning the analysis, determine the level required to address your purposes and outcomes. Levels of analysis range in sophistication from descriptions to interpretations to recommendations. Stakeholder input is important to determine the level of analysis necessary, as it is important that the analysis fulfills all stakeholder information needs.

It is helpful to plan the level of analysis so you can estimate the time and personnel resources required. Depending on the level of analysis, Krueger (2003) reports that it can take 8-120 hours. It is also important to plan how data will be organized. For example, are verbatim transcripts of the discussion going to be produced and analyzed, or will the assistant's notes be the basis of analysis. Data needs to be organized and analyzed to fulfill the reporting requirements. Specific steps for conducting the analysis are discussed in the section, *Analysis and Reporting*.

#### 10. Specify contents of the final report

Similar to the specifying the analysis plan, it is helpful to involve stakeholders in outlining the contents of the final report. In some instances, no written report is

required and a verbal presentation of findings will suffice. Details about report contents are discussed below in *Analysis and Reporting*.

## **II. Recruiting**

Once a participant pool has been identified, a recruitment script should be developed. Recruitment is typically conducted in-person or over the telephone. The recruitment script should include the subject of the research, who will be attending the focus group, what will be requested of the participants, how the conversation will be recorded, what refreshments or incentives will be offered, and what future contacts you will have with participants before the focus group (e.g., reminder telephone calls) (Morgan, 1998b). It is beneficial if the recruitment script conveys the importance of the research, and suggests focus groups are interesting and worthwhile. This information helps reduce the number of no-shows. The CME utilized telephone recruitment procedures. See Appendix D for the telephone recruitment script. It is important to be consistent with each contact made so as not to bias the composition of your participant group.

Maintaining a log of recruitment activities assists in keeping track of contacts and recruitment status (see Appendix E). You may need to contact twenty to thirty people to find approximately ten that will agree to participate. As stated previously, a total of six to twelve participants is ideal. It is advisable to recruit two more participants than is necessary, as you can assume two people will not attend (Stewart & Shamdasani, 1990).

Once the participant agrees to participate in the focus group, obtain a current mailing address/email address so a letter can be sent that confirms the focus group location, date, and time, and enclose/attach a map with directions to the focus group location (see Appendix F). In addition, approximately one week before the focus group, telephone or email participants to remind them of the activity and confirm their attendance.

If a potential participant needs additional information before making a commitment to participate, have a written description ready to send via post or email. This letter/email could be a shorter version of the confirmation letter that is sent out to the participants.

## **III. Moderating**

A skilled moderator is essential for a quality focus group. It is critical that the moderator has an understanding of leadership and group dynamics (Stewart & Shamdasani, 1990). The moderator is the nominal leader and he or she is seated in a central position in the group to reinforce this leadership role. The moderator should be selected based on personality, education, training, and experience. Depending on the research topic, researchers or faculty will not necessarily make the best moderators

Situational variables determine the choice of moderator such as sensitivity of the focus group topic, time constraints, budget constraints, conduciveness of the research space, and demographics of the participants. The moderator should appear like the participants. It is the moderator's role to introduce the focus group topic, loosely guide the discussion to ensure all facets of interest are discussed in the time allotted, ensure participation guidelines are explained and enforced, encourage participation of quiet participants, and constrain the participation of participants who are monopolizing the conversation. Moderators must be aware of their own biases regarding the focus group topic. They must respond to all participants consistently and avoid differentially reinforcing nonverbal communications. Moderators should probe participants for contrary views, and must treat all points of view equally.

A moderator's style will vary on a continuum of directiveness according to the purposes of the research and the amount of time available. It is likely the moderator will shift between directive and non-directive styles in the course of one focus group. The more directive the moderator's style, the more topic coverage permitted. The more non-directive the style, the more the data reflects what is foremost in participants' minds. For more information, Krueger (1998c) provides detailed suggestions for moderating focus groups.

In addition to acquiring a moderator, a focus group assistant must be selected. If possible, the meeting should be audio- or video- recorded so that a transcript can be prepared. Focus group assistants are employed to help with recording equipment and refreshments, arrange the room, welcome participants as they arrive, take notes of the discussion, give an oral summary of the focus group, debrief with the moderator, and give feedback on the analysis and reports (Krueger, 2003). The assistant does not participate in the discussion, but can ask questions when invited to do so by the moderator.

At the end of each focus group, you can ask participants to complete a Focus Group Evaluation Form (see Appendix G). The focus group assistant administers the evaluation. Evaluation forms provide feedback for improving future focus group activities.

#### ***IV. Analysis and Reporting***

As previously stated, the level of specificity in your analysis depends on the defined purposes and desired outcomes of the research. Data analysis can range from the purely descriptive to data reduction to multivariate associations. Regardless of how detailed the analysis, it is important to note that one focus group represents one observation (Stewart & Shamdasani, 1990). The number of participants in a given focus group does not represent the number of observations.

Your analysis can be based on the moderator's memory of the focus group, the assistant's notes of the discussion, an abridged transcript of the taped discussion, or based on a detailed transcript of the focus group audio- or video-

recording (Krueger, 2003). Whatever the basis of analysis, it is important that it commence as soon after the focus group as possible. When analyzing focus group data think about the words used by participants, the context that triggered participants' comments, the internal consistency of group responses (i.e., shifts in group opinions), the frequency or extensiveness to which some comments were made, the intensity (i.e., depth of feeling) of participants' responses, response specificity (i.e., personal experience or vague generality), what was omitted from the conversation, and the big picture or overarching ideas presented in the group discussion. There are numerous approaches to qualitative data analysis that seek to identify themes in responses, and Basics of qualitative research: Techniques and procedures for developing grounded theory (Strauss & Corbin, 1998) provides one user-friendly perspective.

When reporting focus group findings, decide on the most appropriate format, verbal or written. If a written report is necessary, consider a narrative style rather than bulleted style (Krueger, 2003). Remember the purpose of the study and the report's audience when writing. For example, the CME focus group report provided college program developers specific ideas about how the opinions and attitudes of the participants can improve the future placement of students, curriculum or program development.

The sequence of results presentation can be by question or by theme. If required, recommendations can conclude the report. For each theme identified in the analysis provide a few illustrative quotes in the report. Once a draft has been prepared, share it with the focus group assistant, other researchers, or stakeholders for verification. Revise and finalize the report based on the feedback obtained.

## **Ethical and Other Considerations**

### ***Ethics***

Educational institutions, school districts, and private companies often require an internal review of research activities. The purpose of an institutional review board (IRB) is to protect the welfare of research participants. Accordingly, procedures, questions, and materials are reviewed for safety and propriety.

No harm should come to participants physically, psychologically, or socially. Some ethical considerations with focus group methods are participants' risk, participants' privacy, dealing with stressful topics, and setting boundaries (Morgan, 1998a). To improve privacy, the number of people who have access to what participants say and their identities should be minimized. Furthermore, be explicit about who has access to this information and how it will be kept safe and confidential.

Data collection with focus group methods poses a unique challenge regarding privacy. Although you can promise to hold information gathered confidential and private, you cannot ensure that other focus group participants will not share the

contents of the discussion. Consequently, it is important to establish ground rules for participation and have participants agree to refrain from sharing each others' identities and the content of the discussion.

It is the moderator's responsibility to set the ground rules for participation and ensure that these rules are being followed. If your focus group topic is sensitive, the discussion of these issues may create stress among participants. Before the focus group ends, you must plan to lower participants' stress level, and have support service resources and referrals available. Having your focus group procedures and questions considered by an IRB is an excellent way to ensure that you are conducting ethically responsible focus groups.

An important part of conducting ethically sound focus groups is informed consent. The purposes, benefits, procedures, and risks of participating are outlined in the consent form (see Appendix H) and it requires a participant's signature. The consent form should inform participants how the discussion will be recorded (e.g., notes, audio-recorded, video-recorded), assure participants the safety and confidentiality of the information they provide, and provide participants with contact information for the researchers if they have questions or concerns about the focus group.

### ***Other Considerations***

Focus group participants are often provided with incentives for their participation (Stewart & Shamdasani, 1990). Common incentives include stipends (e.g., \$25), gift certificates, or merchandise in the case of market research focus groups. It is important not to offer an incentive that could coerce participation. In the CME example, the interest and benefit for the industries that technical education serves provided enough incentive for industry members to participate.

Beyond incentives, if possible provide beverages, snacks, coffee, etc. to help focus group participants feel welcomed and comfortable. Check with your administration or organization regarding purchase orders/requisitions needed and procedures for securing the appropriate refreshments. Check with the focus group site to ensure that providing beverages and snacks is acceptable.

## **Conclusion**

Our goal was to provide a step-by-step, yet simple, process for planning, organizing, and conducting focus groups along with examples of forms, questions, and timelines. We hope this guide has clarified what a focus group is, why focus groups should be conducted, how to plan them, who should conduct them, and what to do with the information collected. With this guide, the assistance of a social scientist or skilled moderator, and your skills as an instructor of a college or high school professional-technical program, your focus group will be a professional, organized, and informative activity.

## References

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- Krueger, R. A. (1998c). Moderating focus groups. Focus Group Kit 4. Thousand Oaks: Sage.
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- Stewart, D. W., & Shamdasani, P. N. (1990). Focus groups: Theory and practice. Applied Social Research Methods Series, Vol. 20. Newbury Park: Sage.
- Strauss, A., & Corbin, J. (1998). Basics of qualitative research: Techniques and procedures for developing grounded theory (2<sup>nd</sup> ed.). Thousand Oaks: Sage.

## **Additional Web-Based Resources**

Gibbs, A. (1997). Focus groups. Social Research Update, 19. Available:  
<http://www.soc.surrey.ac.uk/sru/SRU19.html>

Market Navigation Inc. (2000). Client guide to the focus group. Available:  
<http://www.mnav.com/cligd.htm>

McNamara, C. (1999). Basics of conducting focus groups. Available:  
<http://www.mapnp.org/library/evaluatn/focusgrp.htm>

## Appendices



**Sample Facilities and Materials Checklist**

**Focus Group #:** \_\_\_\_\_

**Date of Focus Group:** \_\_\_\_\_

**Location:** \_\_\_\_\_

Contact \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

Room # \_\_\_\_\_ Parking \_\_\_\_\_ Directions \_\_\_\_\_

**Furniture:** \_\_\_\_\_ Tables \_\_\_\_\_ Chairs \_\_\_\_\_ Overhead Projector \_\_\_\_\_ Chart Paper

**Food Service:** \_\_\_\_\_

Contact \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

Ordered \_\_\_\_\_ Confirmed \_\_\_\_\_

**Supplies:**

- |                      |  |
|----------------------|--|
| _____ Pencils        | _____ Focus Group Participant Questions        |
| _____ Note Pads      | _____ Focus Group Questions (Moderator script) |
| _____ Name Placards  | _____ Tape Recorder                            |
| _____ Tapes          | _____ Batteries                                |
| _____ Sign-in sheet  | _____ Focus Group Evaluation                   |
| _____ Extension Cord | _____ Masking Tape/Scotch Tape                 |

**Notes:** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**Moderator Name** \_\_\_\_\_ **Recorder (note taker)** \_\_\_\_\_

**Sample Timeline**

The steps of activity in this timeline correspond to the essential steps for conducting focus group research outlined in this document. The particular circumstances of your project may require additional time be allocated to each step; however, the sequence of steps are generalized.

<b>Week</b>	<b>1</b>		<b>2</b>		<b>3</b>		<b>4</b>		<b>5</b>		<b>6</b>	
<b>Planning</b>												
<b>Recruiting</b>												
<b>Moderating</b>												
<b>Analysis/Reporting</b>												

Source: Morgan (p. 14, 1998)

## **Sample Focus Group Questions**

### **Purpose Statement:**

“To determine why industry does not hire graduates from our program. Based on the information and opinions of the focus group participants, develop strategies to address this issue.”

**1. Thinking about the future of your business over the next 10 years, describe the characteristics of a successful manufacturing employee.**

Probes: Work traits, salary expectations, motivation for climbing the ladder, professionalism, learning new technologies, work vs. career value?

**2. Where does your company find qualified employees?**

Probes: Employment agency, local high school or college program, hire away from other employers?

**3. What factors keep people from choosing a career in manufacturing?**

Probes: Lack of knowledge about careers in manufacturing, fear of not matching the stereotype, industry bias against sex/race, industry image?

**4. Given an ideal budget, what could the “community college, high school system or industry” (insert your focus group stakeholders) do to prepare students (or employees) for careers in the manufacturing industry?**

**a. What career paths are available for a person who is considering a career in manufacturing?**

Probes: Income opportunities, promotions, and areas of specialization?

**b. What training, education, and experience would be required for a person to be successful in a manufacturing career? What are the specific skills?**

Probes: At the high school level?

Community or technical college level?

Rate these skills (after the skills have been listed)

**c. Where do people learn about training opportunities and careers in manufacturing?**

Probes: School, family, community?

### **Sample Telephone Script**

Identification: My Name is (Your Name), I work with (school, organization, or employer).

Purpose: We are researching the possibilities of revising our program to better meet the needs of our graduating students and the employers who hire them...

Method: We are conducting an industry (community, special interest) focus group to learn about current attitudes regarding manufacturing careers and what skills new employees should have. We are recruiting approximately 10 people; and it will take about 1 to 2 hours of your time.

The focus group is scheduled to take place on (Date), (Time) at (Location).

Would you be interested in attending?

Do you mind being audio recorded?

I would like to send you a letter confirming your participation. It will include directions to the focus group location. May I have your address, please?

Approximately one week before the focus group, I will call you to confirm your participation and answer any questions you may have. Thank you for agreeing to participate. I look forward to meeting you soon.

Note: If the person contacted cannot attend, can they refer others who may be interested?



**Sample Confirmation Letter**

<Name and address of the participant>

<Date>

Dear < > ,

Thank you for agreeing to participate in our industry focus group. The Puget Sound Consortium for Manufacturing Excellence (CME) values your views and opinions.

Manufacturers are finding it difficult to find qualified workers. This focus group is designed to gather your input regarding the training needs of your current and future workforce. By understanding these needs, we can develop recruitment strategies to attract new people to the manufacturing industry. The information you provide will also assist us in the design of new training curriculum for technical education programs. Our goal is to increase enrollment in our manufacturing program and to have the students who graduate ready to work with the skills our industry needs.

Location:      Name of your location  
                    Street Address (Written directions and map attached)  
                    City, State  
                    Phone Number  
                    Room Number

Date:            Day, Month, Year

Time:           00:00 a.m. to 00:00 a.m.

Please remember that this meeting will be recorded and your comments may be included in the final report. The identity of all meeting participants will be kept confidential.

I look forward to meeting with you on (Date). If you have any questions, please call me at (your phone number).

Sincerely,

Name  
Title – (Focus Group Coordinator)  
Address  
Phone number

**Sample Focus Group Evaluation Form**

## Focus Group Evaluation Form

Thank you for attending the focus group for < insert project name>. We hope that you will take time to complete this questionnaire because your input is vital to improving future focus groups. Your response is anonymous and voluntary—you do not have to fill it out or answer all of the questions—but your help is greatly appreciated.

Using the following scale, please circle your best response:

	<b>Strongly Disagree</b>	<b>Disagree</b>	<b>Neutral</b>	<b>Agree</b>	<b>Strongly Agree</b>
1. Focus group information provided before your arrival was sufficient.	1	2	3	4	5
2. The focus group was conducted in a professional manner.	1	2	3	4	5
3. The facilitator was effective.	1	2	3	4	5
4. The focus group was interesting.	1	2	3	4	5
5. The focus group was informative.	1	2	3	4	5
6. There was sufficient time for the discussion.	1	2	3	4	5
7. The focus group location was convenient.	1	2	3	4	5
8. My participation in the focus group was worthwhile.	1	2	3	4	5
9. My understanding of <focus group topic> has increased.	1	2	3	4	5

10. Additional comments:

Thank you for your participation!

**Sample Consent Form**

## CONSENT FORM

PUGET SOUND CONSORTIUM FOR MANUFACTURING EXCELLENCE (CME)  
FOCUS GROUP

Researcher: Name, Title, Office Name, phone number, e-mail address

**Researcher's Statement**

I am asking you to participate in a focus group for the Puget Sound Consortium for Manufacturing Excellence (CME). The purpose of this consent form is to give you information you will need to help you decide whether or not to participate. Please read the form carefully. You may ask questions about the purpose of the focus group, what I would ask you to do, the possible risks and benefits, your rights as a volunteer, and anything else about the focus group or this form that is not clear. When all your questions have been answered, you can decide if you want to participate or not. This process is called "informed consent." I will give you a copy of this form for your records.

## PURPOSE AND BENEFITS

The CME is establishing a regional consortium to develop and implement programs and services providing Puget Sound industry workers with the tools and techniques required for world-class manufacturing. The CME works with local educational partners (e.g., Shoreline Community College) to promote manufacturing career opportunities to students. Toward this goal, the CME is developing recruitment and retention strategies for a diverse workforce. Of particular interest is industry's current and future workforce needs. The purpose of the focus group is to obtain information so that we can offer suggestions for recruitment and retention program development. The benefits of participating in the focus group include contributing to the CME's ability to design recruitment and retention strategies that are appropriate for industry's needs.

## PROCEDURES

If you choose to be in this study, we would like you to attend a focus group about careers in manufacturing. The discussion will take about 60 minutes. The focus group questions will center on your perceptions of manufacturing and issues surrounding obtaining a career in manufacturing. For example we will ask, "Where does your company find qualified employees?" "What factors keep people from choosing a career in manufacturing?" and "What career paths are available for a person who is considering a career in manufacturing?" At any time you may refuse to answer any question you feel is inappropriate.

I will be taking notes during the focus group, but I would also like to audiotape record the focus group so that I can have an accurate record. Only the research team will have access to the audiotapes, which will be kept in a locked file cabinet. We will be using the tapes to compensate for incomplete notes and to ensure accuracy of direct quotes. We will transcribe any quotes we would like to use and then destroy the tapes within 60 days of the focus group. Please indicate your permission below, with your initials, whether you give your permission for the discussion to be audiotape recorded.

\_\_\_\_ I give my permission for the researcher to audiotape the focus group discussion.

\_\_\_\_ I do NOT give my permission for the researcher to audiotape the focus group discussion.



## RISKS, STRESS, OR DISCOMFORT

Although it is unlikely that there will be any risk, stress, or discomfort involved in the focus group, some people feel uncomfortable participating in focus groups or feel that being in a study is an invasion of privacy. I will do all that I can to make you feel comfortable, but at any time you may withdraw from the study without any risk to you.

## OTHER INFORMATION

Taking part in this study is voluntary. You may refuse to participate or may withdraw at any time without penalty. All of the information from this study will be confidential, and only the research team will have access to any identifiable data. The data will be analyzed inductively, moving from the large set of information to patterns and categories of information that support suggestions for development of recruitment and retention strategies that are appropriate for women. I will keep the audiotapes of the focus group until, <insert date 60 days after focus group> and then I will destroy the tapes. Data will be retained until <insert project completion date> when the CME project concludes. The report will go to the CME Project Directors. The report will not identify you, but will provide general findings and suggestions for improvement. However, the research staff cannot safeguard against focus group participants sharing information learned from the group with outsiders. We ask that focus group participants keep information that has been shared with the group confidential to ensure individuals' privacy.

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Printed name of researcher

Signature of researcher

Date

## Participant's Statement

This study has been explained to me and I volunteer to take part. I have had a chance to ask questions, but if I have questions later on, I can ask the evaluator listed above. If I have questions about my rights as a research participant, I can call the <insert name of IRB and telephone number.> I will receive a copy of this consent form.

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Printed name of participant

Signature of participant

Date