

Appendix 3

Guide to Conducting Focus Groups (South Africa 1998)

## I. INTRODUCTION

The following manual is to serve as an aid in the design and implementation of focus group projects. The purpose of the manual is to serve as a road map to individuals and organizations charged with conducting focus groups. As the term road map indicates, there are many ways to get to the end point of a completed focus group project. The purpose of this road map is to offer one way based on the knowledge and experience of the National Democratic Institute for International Affairs (NDI) in conducting focus groups in the Southern Africa region.

The NDI experience draws specifically upon the work of NDI in South Africa and Lesotho. However, these programs benefited greatly from the knowledge and expertise of the programs in Malawi, Namibia and Mozambique. All told, NDI has been conducting focus groups in the Southern Africa region since 1992. The content and purpose of these focus groups have focused on voter education and democratic development issues. The methodology employed by NDI is based on standard focus group techniques recognized as legitimate social science research. The NDI approach does focus on and strive to reach individuals in rural and deep rural areas. Often in newly developing democracies, these people have the least access to knowledge and are the most difficult to reach with information. Thus, the following manual concentrates on reaching the most hard to reach and difficult groups; however, standard techniques for reaching all audiences are discussed.

The layout of the manual is divided into to separate sections. The first section concentrates on the stages of a focus group project. This section divides a focus group project down into five sections: training, guide development, preparation, fieldwork, reporting. The manual will go into depth in each of these sections about practices that NDI employs and the practices to avoid. Due to the type of research that NDI conducts, race and language skills play a prominate role in the process. For this reason, a major component of the NDI program is to train individuals to conduct focus groups. The second section concentrates on the staffing of a focus group project. This section details the different roles and responsibilities of each person in a focus group project. In this section, one must remember that NDI is not a professional research house and handles the staffing in a unique manner. The staffing structure relies heavily upon contractual employees who are trained in NDI workshops.

## II. SECTION ONE: FIVE STAGES OF THE FOCUS GROUP PROCESS

### A. TRAINING

The unique difference to the NDI approach versus a professional research firm is the training component of the program. In a professional research firm the focus group moderators are generally retained on a contractual basis and may or may not have been trained by the firm itself. NDI found in various instances in Southern Africa professional research firms did not exist or did not have race or linguistic capabilities to conduct research in these countries. For example, in South Africa the research firms had existed for long periods of time but had predominately focused on white households for research. In this instance, the firms were ill equipped to implement research in deep rural coloured and black areas in South Africa. Not only did these firms not have access to these areas, but, more importantly they were unable to have skilled moderators conduct the groups in these areas.

After many attempts with professional research firms, NDI applied the research program conducted in Malawi and Namibia to South Africa. In this instance, NDI affiliated itself with a local South African organization to conduct research. In this regard, NDI would provide the financial backing to the local organization and the local organization would provide people to serve as moderators and contacts into rural communities. In the case of South Africa, NDI selected the organization Street Law because of its national reach and ties to local communities. After selecting Street Law then NDI went about implementing the focus group program.

The training of individuals to be focus group moderators is based on a three day workshop at the local Street Law office. In this instance, Street Law would secure a venue for the focus group work and NDI would conduct the training. The focus of the training is to train focus group moderators from university law students that Street Law uses to conduct workshops in the formerly disadvantaged communities in South Africa. The use of students is key for a number of reasons. First, the students are used to receiving and digesting large amounts of information in a short period of time. Second, the students, as opposed to the person in the street, will tend to be highly motivated. Finally, student labor is much cheaper than using professional freelance moderators.

The basic training tools of the training workshop are a professional lecturer or similar person on focus groups, a moderators, checklist for the selection of moderators and two NDI produced training manuals. The two training manuals serve two separate purposes. One manual is basic material and tips about what focus groups are and how to conduct one. The second manual is a set of discussion guides and screener guides. The discussion guides are from past focus groups and one is specifically tailored for day three of the workshop. These two manuals no matter if the workshop is extended would need little change.

Day one of the workshop is a basic lecture in focus group methodology. This section of the workshop should be conducted by a professional with a

knowledge or basis in statistical research methodologies. The task of the Street Law and NDI staff is to assist this person in conducting the workshop by supporting the workshop. The Street Law and NDI staff set up the venue and provided the materials. Also, the Street Law staff recruited the students. At this point in time, the appropriate amount of students for the workshop is roughly 15 to 20. The error should always be made on the upside of 15. The reason behind having at least 15 students is for choice. One wants to be able to choose the best moderators at the end of the day.

More importantly, the students chosen must match the racial and linguistic backgrounds of the region or country. For example, in South Africa, 11 official languages are spoken and 4 racial groups exist. In order for a major focus group project to occur then moderators from each of these racial groups must be trained. In addition, the sex of the moderators is important so in addition to 11 languages and 4 racial groups then male and female moderators for these groups must be chosen. In opposition to South Africa, in Lesotho over 90 percent of the population is SeSotho speaking and of the same race. Thus, the breakdown of moderators only needed to be one race, different sexes and SeSotho speaking. The best situation is to pick moderators who are multi-lingual.

In addition, beside linguistic and racial selection, attention should be paid to the grade the students are attending. The ideal moderator would be a first or second year student because of this would greatly reduce training costs for future years. In effect, a first year student trained provides at least two more years of productivity while a third year student is a large investment because they leave the program. In some cases, choosing a third year student cannot be avoided by the selectors due to skill and necessity. However, in a choice between equally matched or slightly less able first to third year students, then the first year student should be chosen because they will have the opportunity to improve.

The professional conducting this section of the workshop should strive to lay a theoretical foundation for students about field research. At this point in time it is critical to differentiate between quantitative and qualitative research. Focus group research is qualitative research because larger generalizations cannot be drawn from the research. The introduction of research methodologies allows students to understand the entire picture of the process. Also, it is the first chance for students to drop out of the workshop if they are not interested in research.

Day two of the workshop is centered around the actual conducting of a focus group and small group exercises. In effect, students see what a focus group is after the theoretical background and then get to practice. At the initial workshop, NDI hired a professional focus group moderator to participate in the workshop. After the theoretical lecture, the moderator added valuable insights into the small group process and the final selection of moderators.

In addition, the Angola program used the same moderator in their workshop there. However, after the initial training and focus group project, NDI used the student moderators that it had trained. By using student moderators, NDI saved costs and built a valuable skill back into the program. In effect, the training was utilized to save on latter parts of the workshop.

The small group activities focused on familiarizing students with various parts of the focus group process. Generally, students practiced amongst themselves in groups of three people. During this practice time period, the students were observed by the NDI, Street Law, lecturer and moderators. Tips were given to the students to assist them in the process. In addition, the observers started to pick the various students who seemed to excel at the process. This initial screening was in preparation for the final day in which moderators were chosen from amongst the workshop. The informal process allowed for a close observation of the various students who stood out as exceptional.

On the final day of the workshop, NDI and Street Law arranged for the students to conduct actual focus groups. In this manner, students were observed conducting an actual focus group and then were chosen on the merits of who were the best four to six students. Initially, this exercise was conducted in a township located somewhere close to the university. This exercise gave the students a bit of field experience. However, due to cost the program was adapted to simply conduct the focus groups at the university where the workshop had occurred. In this situation, students still conducted focus groups under easier conditions. Also, more attention can be placed on the small group activities.

Only on the final day of the workshop should the final students be selected to become moderators. The reason why one should wait until the last day rests in the fact that some students might not excel at day two of the workshop, but, might be exceptional in the actual focus group. In allowing for selection until the final day, the workshop format allows for late bloomers to be taken into the project. For example, if a student does not stand out on day two, but, the student goes home that evening and studies the guide and practices then that student might stand out on day three. Also, by selecting a student that is more willing to put time in during a workshop then one is selecting a better student for future work because they are committed to the process. In the initial training workshop, selection was only done on the final day, however, a trend towards second day selection has started to develop. This trend must be stopped. In addition, the selection template developed by Susan Booyesen should always be utilized in the process. The template for selection has been steadily refined over the course of three training and is an excellent tool to select moderators.

One major component of the focus group training workshop that has been lacking is training on conduct in the field. Initially, so much attention was

placed on the selection of moderators that the idea of the field work was secondary. However, the selection of moderators has become much easier due to the acquired experience collectively of NDI and Street Law. In this learning curve, the issues surrounding field work have become the major pitfalls in the processes or the remaining stumbling blocks to the success of the field work. In this instance, a session should be added to the workshop during the last part of the third day. The section should focus on the students' roles in the field and the chain of command. Students will have a greater understanding of the requirements of field work and what is expected of them once in the field. In addition, a section concerning the field should be added to the manuals that form the basis of the workshop.

In addition, the program must make a concerted effort to attract more students from different racial categories. Especially, white, Indian and coloured students. These races are lacking in the current group of moderators and severely hamper the ability of NDI and Street Law to conduct work outside of the black community. At present the project has only one female Indian moderator and four coloured moderators. The program completely lacks any trained white moderators. The Indian moderators are only in Durban and the coloured moderators only in Cape Town. Thus, if coloured or Indian groups want to be conducted outside of these two respective provinces then the moderators must be transported to the various provinces.

Finally, a fourth day should be added to the workshop for the students who have been selected as moderators. The workshop allows each student the ability to do one focus group. The students chosen as moderators should get a chance to do one more focus group. The university provides a ready pool of students and at a minimal cost moderators can receive additional training. The focus on additional training will produce a better core of moderators, who can receive additional inputs to their technique. During the first focus group, the selectors do not have time to carefully review and critique all the moderators because of the time demands. On the fourth day of the workshop, each moderator can be critiqued and given tips to improve upon for later work.

In addition to the initial training being conducted by at the workshop, a critical component of the training approach is to refresh the moderators' skills from time to time. A recommended level of training would be that a moderator conduct at least one focus group every four months or three focus groups a year. In cases where the program has actual work to undertake, then no refresher focus groups need to occur. Again, the fact that Street Law is located on university campuses makes the process of retraining very easy in that a pool of students exists from which to draw focus group participants. For the sum of roughly 20 to 30 rand, Street Law can arrange the exact number of focus groups that it has moderators to conduct and hold focus groups late in the day. The coordinator of the program and even NDI staff

can assist in monitoring the focus groups to ensure that they moderators are conducting them properly. The same guide can be used from a past focus group. Remember these groups are just to allow moderators to keep their skills sharp.

## B. GUIDE DEVELOPMENT

The development of the focus group guide or research instrument should occur before the actual fieldwork begins. One of the major problems with the NDI focus group fieldwork has been that the guide was not finalized until the groups were in the field. This situation is counter productive to the mission of the field work because valuable time must be spent translating the discussion guide instead of preparing for the field work component of the work. In addition, the guide is often changed at the last minute or after fieldwork has begun, which brings methodological challenges to the fieldwork because in the report writing process comparison is made more difficult. The finalization of the focus group guide should be complete two weeks before fieldwork begins and translation should be complete before any debriefing occurs.

The development of the guide depends largely upon the subject area that is being explored. If the guide being developed is on issues such as voter education or democracy development then former NDI guides should serve as the basis. A collection of old focus group guides has been photocopied and provided to Street Law for future reference. In the guide being developed is not on the above mentioned topics then the guide must be developed in conjunction with an expert in that issue area. For example, if the guide is being developed around the issue area of local government then a local government expert needs to review the guide. Anyone can write a guide as long as the guide is reviewed by others with a greater knowledge of the focus group process.

The length of a guide is of critical importance because participants are real people and may become tired of the activity. Based on extensive experience, a guide should be roughly around two hours in length. A guide shorter than two hours might not give the report writer enough information or detail. A guide around two and a half hours will eventually lead to a three hour discussion. By this period of time people are tired and participation has significantly dropped. An important point to remember is that the structure of the guide builds towards answering the more important or critical questions at the end of the discussion. In this instance, if a guide is too long then the critical questions are paid the least amount of attention.

A guide must be methodologically sound as a document. What is meant by this statement is that a guide must be careful to exclude leading questions because this can bias the research. A focus group is based upon asking the

views of the participants in an open manner. However, a focus group guide can be constructed to lead participants to give a specific answer through the form and development of questions. Thus, a focus group guide must not only be checked for content but methodologically. A guide must begin the discussion but in no manner should a guide lead participants in any particular direction. In addition, the methodology of the guide includes making a concerted effort to match various racial groups with same race moderators. Finally, moderators conducting groups should always be the same sex.

If a guide includes any type of activity besides simple discussion then serious thought must be given to the placement of the activity in a guide. For example, in the Lesotho focus group project, the guide included an activity in which participants voted on the voter education materials that they liked the most. In this situation, the activity was directly in the middle of the focus group. After a series of practice groups, the field work team found that the discussions were severely hampered by the activity in the middle of the discussion and the activity was moved to the end. Activities in focus groups are extremely useful; however, they can hamper or even stop the momentum of the group. Thus, if an activity is planned in the focus group then test groups must be conducted. In addition, in an activity all materials must be labeled in a standard manner. Each focus group must use the same materials with the same labels. Again in Lesotho, the voter education materials were divided into sets and uniformly labeled. This standardization is necessary for the purpose of report writing.

Finally, all guides produced by NDI are in English. In this situation, all guides should be translated into the native languages that will be used in the focus group project. The NDI and Street Law has a spotty record of translation of the guides. Initially, the students wanted translated guide. However, after the initial process of translation, students who were the native language speakers complained that the guides were translated by non-native language speakers. In this instance, the guides had to be retranslated by the students. The translation of the guides should occur before the groups begin and by a native language speaker of that area. For example, the guides used in the Northern Province should always be translated by people there because the native languages spoken there are in a different form than those spoken by someone in Cape Town. Again, translation is critical so that all moderators are asking the same indential questions for the report writing process.

While not generally practices by NDI and Street Law the guides should be tested in one group before the actual field work begins. Again this activity can occur on the university campus and contain students. The practice group should be conducted in front of the writer of the guide and the report writer. The aim and purpose of the practice group is to ensure that the intent of the guide is being understood, that the guide flows smoothly, and that the questions are not above the audience. If one is using university students and



they are having a hard time understanding or answering questions then when the guide is applied to the general population it is safe to assume they will experience more difficulty with the guide. For example, the NDI and Street Law project on the constitution developed a very complicated guide on the constitution which ordinary people had a hard time understanding. Had a pattern of testing been in place before the groups started then difficult sections of the guide could have been changed.

### C. PREPARATION

The process of preparation for focus groups breaks down into four key components: group selection, administration/logistics, recruiting and debriefing. These four components build upon each other and ensure the success of the fieldwork stage. Without careful preparation then the fieldwork stage will fail, which in the field work stage translates into the focus groups costing considerably more money. In this situation, the focus group project must adhere strictly to the preparation principles or the fieldwork component suffers and hampers the final stages of the process. The preparation stage should begin as soon as the focus group guide is in the developmental stages. The selection of where and when the groups will occur is critical to setting the availability of moderators and staff. This stage should be integral to the development of the guide. The administration and logistics stage should start as soon as the guide is developed. The recruiting stage of the project should occur once the project has been commissioned. Recruiting is the key component to the success of fieldwork and poor recruiting equals poor focus groups. The last stage of the preparation cycle is a moderator briefing and run through of the guide.

#### ***Group Selection***

The setting of dates and commitment of staff is a critical up front activity. In the setting of dates, moderators schedules need to be given strong consideration as do staff schedules. However, if Street Law is to ever run the program as a money making enterprise then top priority must always be given to the client. At no time can the academic calendar interfere with the fieldwork of focus groups or else clients will not be able to rely upon Street Law to deliver results. In the setting of schedules, three critical factors come into play. The language, race and sex of the moderators needed is critical to the scheduling of the groups. Moderators for coloured groups in Johannesburg or white groups in Cape Town must be factored into the mix because at present these moderators only exist in various provinces and will need to be transported to the focus group sight.

In addition to the selection of dates and staff commitment, the project needs to set the number of groups and where the groups will occur. The number and location of groups is critical to the logistics and the recruiting. The

number of groups relates to factors such as equipment and the number of moderators needed as well as money and time commitments. The location of the groups relates directly as to how much time is necessary for recruiting. The late selection of the number and location of the groups will hamper the entire fieldwork process. Due to the contacts of Street Law, focus groups can occur anywhere and within any racial as well as socioeconomic category in South Africa. However, in order for groups to occur proper time and planning must be given.

### ***Administration and Logistics***

The administration and logistics function of the preparation cycle ensure that everything is ready for the field and the everyone can get to where they need to go. The structure of the NDI and Street Law program is supposed to put logistics to a minimum by having moderators in each province; however, this situation may not be functioning at all times. The initial step in the administration and logistics function is the development of a budget to cover the costs of the fieldwork. The money must be ample enough to cover the groups with enough wiggle room to ensure that the fieldworkers are not shorted. Once outside of the major urban areas in the region, the economy is based on cash, without cash, the fieldwork project will suffer or even fail.

The budget must include the cost per group of paying participants, the cost per group of turning away participants, cost per group of paying for venue rental and the cost per group of paying recruiters and others in the community such as chiefs. In addition, the costs must cover food and drink for the groups as well as petrol and tolls for the fieldworkers. Also, the money must be enough to cover the costs of per diem for the fieldworkers moderators. The per diem may include the costs of lodging at various hotels as well. Finally, the budget should include payment of the moderators. An accounting system for the money must be developed so that fieldworkers can track expenditures properly to ensure that the money has been utilized within the structures of the Institutes. The accounting system will be covered later in the manual.

The administration aspects focuses on three things. First, all equipment must be readied and all materials must be purchased or produced. The equipment in question is the translation devices and the tape recorders. The translation equipment must be checked to ensure that the report writer can use it if necessary. The tape recorders are central to the success of the project. If they do not work then the project has basically failed. In addition, microphones were purchased for past focus group projects but stolen from the NDI office. These should be purchased again because they greatly assist the tape recorders in capturing everything. In addition, the photocopying of materials must be undertaken in order to prepared screener guides, moderating debriefing forms and blank invoices. In this situation, the

materials photocopied can then be divided into the proper amounts for the various field work sights.

Second, the materials for the focus group process must be purchased including: tapes, batteries for the tape recorders, batteries for the translation equipment, name tags and markers. This group of equipment is extremely hard to purchase once outside of the major urban areas. Other things such as food and drink for the groups can be purchased in the field. Finally, a check must be cut and money for the groups allocated to an individual in total. This step is critical. Fieldworkers cannot be allocated less than the total amount of money before going into the field.

The logistical arrangements depend upon where the groups will occur and who is involved with the groups. In this situation, hotels will have to be booked for overnight stays. The general rule of the program is to book hotels as close as possible to the sight of the actual focus groups. This rule was developed to avoid excessive travel that occurred on a focus group project. In addition, flights will have to be arranged if staff and moderators need to be transported around the country. The arrangement and booking of flights should abide by institutional rules. Finally, the rental of vehicles needs to occur. In the past, the general rule followed was to hire a combi and a car. However, a better alternative might be to use cars instead or a venture and a car. A series of KwaZulu-Natal groups were conducted using two small cars. This scenario saved money and did not hamper the success of the project.

### ***Recruiting***

The most critical component to successful fieldwork is the recruiting of participants! If this stage has been neglected then the entire program is at risk. In addition, an initial up-front investment in recruiting can save major amounts of money once in the field. Poor recruiting can set back a focus group project days and cost major amounts of money in rescheduling and keeping people in those locations. A group is bound to fail from time to time; however, proper recruiting can keep this to a minimum. Recruiting should occur at the very least 14 days before the group is to occur! The optimal recruiting timeframe is 30 days before the groups is to occur because in this manner then the schedule of activities for the project can be shifted to include target groups.

The recruiting process must always begin with a visit to the gatekeeper of the community. In this instance, the aim and purpose of the research should be defined to this individual or group. Upon meeting the gatekeeper, then the recruiter can go to other groups within that community to set-up the actual focus group. The gatekeeper can be any number of people or groups within the community. For example, the local councilor, principle of the school, pastor at the church, community NGO worker, chief or political party activist to name a few. This person will gain you entrance into the

community and without their assistance you may not even be able to work in the community. In addition, some money may need to be spent in assuring the gatekeepers goodwill and assistance. In the case of a chief, some form of payment is customary in South Africa in order to work in the community.

After an initial meeting with the gatekeeper, the secondary meetings can be scheduled with the various actors who will take you into the community. As examples to successful recruiting lets look to the Lesotho focus group project and the KwaZulu-Natal traditional leaders project. These examples are not to say that groups did not occur, but, that by using gatekeepers then mistakes are kept to a minimum. In Lesotho, NDI used the Lesotho Council of Nongovernmental Organizations (LCN) as the gatekeeper. An initial meeting was set with the president and executive members of the board of the LCN four weeks before the fieldwork began. After describing the project, another meeting occurred in which NDI was introduced to the directors of various NGOs within the LCN. These individuals then institutionally agreed to assist NDI. At that time an additional meeting was set for the return of NDI four weeks later. During the follow-up meeting, NDI was introduced to the various people within each NGO who would be taking use into the communities. At this meeting, exact times, dates and locations were established for the focus group project.

In KwaZulu-Natal, a series a meetings occurred at every political level to ensure the success of the project. NDI was introduced to various high ranking members of the Inkatha Freedom Party (IFP) at a national level and members of the African National Congress (ANC) at the provincial level by the Chief Directorate of Traditional Leaders of the Ministry of Provincial Affairs and Constitutional Development. The ground work for a project that occurred in December 1997 began in April 1997. A series of five meetings began with the members of the IFP and the ANC in order to process the request and get to the proper people. These meetings lead to provincial consensus by the ANC and the IFP that NDI could conduct this research in the province. After the political consensus was given then NDI met with the provincial MEC for Traditional Leaders. He issued the directive that the Department of Traditional Leaders would assist NDI by all means necessary. Finally, the Director of the Department agreed to the NDI plan of action and worked with his staff to develop a plan of action. These activities occurred from April until September 1997. Finally, the day before the fieldwork was to start, NDI met with the Director and his staff to establish times, locations and dates for the fieldwork in various areas.

In each of the above examples, the success of the project, despite all the others problems that arose, was vested in the recruiting process. In Lesotho only one of 22 focus groups was canceled and in KwaZulu-Natal only two of 20 were canceled. In each case, the cancelations were due to the recruiters and not NDI. This average exceeds the focus groups that NDI conducted a professional research firm to conduct in South Africa. Looking at the

KwaZulu-Natal groups, the cancelation only forced the groups to stay an extra day and the Lesotho group canceled was made up another day and caused no extra expenses.

Critical to the recruiting process is the socioeconomic status of ones group. Any group that is more well off will be harder to recruit and will take more time. A group of professional Indians will take more effort to recruit than a group of unemployed Indians. Likewise someone in Sandton will be harder to reach regardless of color than a person in squatter camp in Soweto. In instances where employed or educated people want to be recruited then the schedule of the field work might have to conform more to the participants schedule than the schedule of the research team. Also, employed and educated people will need to be recruited using the at least 14 days principle. In an wealthy neighborhood, people will not leave their houses to be involved in a focus group and might not be available until after working hours. In a squatter camp, people will be available during a weekday afternoon.

Finally, during the recruiting process, a venue must be secured. In the process, one can rely on the gatekeeper or later people along the recruiting path to secure a venue. A venue should be the last thing secured because the gatekeeper might collect a group of people far from the initial venue sight. If one chooses a venue and is not flexible then participants might not show-up at the focus group. Also, an attempt should be made to ensure that the venue has a roof and is quiet for the tape recorder. Only under the most desperate of circumstances should a focus group be held outside because of the tape recorders will have difficulty recording the entire group clearly. However, if a focus group needs to be held outside then ensure that the group is as far as possible from noisy areas.

### ***Briefing***

The final stages of the preparation process is the moderator briefing that needs to occur. The briefing is to acquaint the moderators with the guide and explain the meaning of sections within it. Also, if any activities are to occur then these can be explained as well. The briefings should be roughly one to two hours long and conducted by the NDI or Street Law staff. The briefing is essential to the moderators and should be conducted the day before field work begins. The importance of the briefing the day before is so moderators can review the guide the night before. During this time, any critical sections or confusing terms need to be explained.

In an event where moderators have not conducted groups in at least four months then the briefing should be lengthened to allow moderators to have a practice focus group. In this situation, students can be used from the university as practice groups. Not all the time does a moderator need a

practice group before undertaking a group. Only in those situations where the moderator has not conducted a group is a practice group necessary.

#### D. FIELDWORK

The first three stages of the road map are the foundation for a solid period of fieldwork. The basis of fieldwork is actual collection of material and information via focus groups. This section on fieldwork will only concentrate on those things that are of importance once a fieldteam has been deployed. Fieldwork can constitute being deployed in KwaZulu-Natal for 11 days in an effort to undertake 20 focus groups or driving to Langa for the afternoon to conduct one. What ever the end result the principles are the same. Fieldwork is defined by the following issues: moderator packets, screening, room set-up, conducting the group, clean-up, tape collection, debriefing forms and moderator focus group.

##### ***Moderator Packets***

The moderators packet is a bag that contains the following pieces of material: tape recorder, microphone, blank tapes, batteries for tape recorder, name tags, marker and any activity material for the focus group. This bag is under the control of the moderator for the day. The moderator signs the bag out from the field director and is responsible for the contents of the bag. If the bag is returned missing a tape recorder then the moderator will be responsible for the missing equipment to the point of the cost of the tape recorder being deducted from final payment. The purpose of the bags is to properly and safely track the equipment so that someone is always responsible for it. A sign out sheet should be used. In addition, the packet will ensure that a proper accounting of tapes occurs. At the end of a day, the packet should be returned to the field director including the tapes for the day.

##### ***Screening***

The process of screening should occur as soon as the team arrives at a site and people are present. Screening is critical in order to get the exact specifications of the group. In all cases a focus group is attempting to have a total of 10 participants, but, for group cohesion eight participants can make up a group. Under the current system, a group of less than eight is generally not acceptable. The screening should be conducted by the assistants to the moderator. The moderator should help screening only after they have prepared for the group.

In the recruiting process, the recruiter should always try to attract 12 to 15 people for a 10 person group. This over-recruiting will allow the fieldteam to pick the eight to 10 best people for the group.