Focus Group Planning Checklist

Directions: This checklist is designed to assist you with the planning and implementation of a focus group. It can be used as an easy guide to keep you on schedule and make sure you keep track of all of the many pieces involved in having a successful focus group.

Step 1: Decide how you will use the focus group tool
□ Focus groups can be used to explore many issues or aspects of your work.

<table>
<thead>
<tr>
<th>Appropriate when you want to...</th>
<th>Not appropriate when you...</th>
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<tbody>
<tr>
<td>• Learn from interaction among participants</td>
<td>• Want people to come to consensus</td>
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<tr>
<td>• Explore and get in-depth and nuances of opinions</td>
<td>• Need to ask participants sensitive questions</td>
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<td>• Understand differences in perspectives</td>
<td>• Want to educate people</td>
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<td>• Understand what factors influence opinions or behaviors</td>
<td>• Want to generalize findings to a larger population</td>
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<td>• Test materials or products</td>
<td>• Are working with emotionally or politically charged groups</td>
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<tr>
<td>• Test reactions to actual or proposed services</td>
<td>• Want to measure program effectiveness</td>
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<tr>
<td>• Design or understand the results of a large quantitative study</td>
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<tr>
<td>• Capture comments of the target audience</td>
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Step 2: Plan your focus groups
□ Determine who will be invited, how many to invite, and who will do the recruiting.
□ Recruit 10-12 potential participants for each focus group, and expect 6-10 to attend.
□ Allow at least 3 weeks for the recruitment process.

Step 3: Prepare parent consent and participant assent
□ Determine need for parental consent for focus groups based on your focus group location and agency requirements.
□ Prepare the parent consent and/or participant assent forms on your letterhead and include the information that is relevant to your focus groups.
□ Make two copies of the participant assent form per person in group. Participants keep one copy and sign and return one copy to the facilitator.

Step 4: Develop your focus group protocol
□ Include the 7 essential elements in your protocol:
  • Welcome
  • Participant Assent
  • Group Agreements
  • Introductions
  • Opening Questions
  • Main Questions
  • Closing
Step 5: Organize logistics for the focus groups

☑ Choose a location that is easy to get to for participants.
☑ Choose a space that has enough room for people to sit comfortably.
☑ Determine if you can provide healthy snacks and drinks.
☑ Determine if you need to provide childcare.
☑ Determine if you need to provide transportation (bus passes, tokens, or taxi vouchers).
☑ Decide who will be the moderator and note taker. It is best if the moderator is a neutral person, not necessarily connected to the aspect of your program that you are exploring in the focus group.
☑ Moderator and note taker should familiarize themselves with the focus group protocol and questions before the focus groups.
☐ It is strongly recommended that you tape record the focus groups in addition to having a note taker.

Step 6: Detail to finalize before the focus groups

☐ Confirm that the parent consent forms have been sent out and returned.
☐ Confirm the location, and time with your focus group participants the day before, and answer any outstanding questions.
☐ If conducting your group in an off-site location (such as a school or facility), find out if there are special rules about checking in at the office, rules about where to park, and procedures for getting participants to the assigned room.
☐ Confirm that the food/snack/drinks are ready for delivery or pick-up.
☐ Create signs with directions to the focus group location.

Step 7: Supplies to take to the focus group:

☐ Focus group protocol and note taking template (bring two sets of each in case you need to split the group into two groups)
☐ Tape recorder and microphone
☐ Extension cord/spare batteries
☐ Blank tapes (if recorder uses them)
☐ Pens and markers
☐ Name tents or name tags
☐ Copies of participant assent forms (Make 2 copies per person in group. Participants keep one copy and sign and return one copy to facilitator.)
☐ Clip board (can be used as writing surface for note taker)
☐ Clock/watch
☐ Flip chart and masking tape (may be used if generating ideas/lists)
☐ Sign-in sheet
☐ Location and directions signs
☐ Incentives (if providing)
  • Water/snacks (plates/napkins)
  • Gift certificates/cash