



# The use of critical incident technique in population health intervention research: lessons learned

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The critical incident technique (CIT) is widely used in qualitative research to reconstruct processes. Since its conception by Flanagan (1954), it has been used in various fields (Butterfield et al. 2005). Recently, Figueiro et al. (2017) introduced a variant, the critical event card (CEC), a tool for analyzing the evolution of complex public health interventions using critical events. We used this tool to reconstruct and analyze deliberative processes involved in the revision of the policy framework of the “Montreal Initiative”, an intersectoral social development intervention. The Initiative was created in 2006 by public and philanthropic financial partners along with an associative partner representing front-line organizations. Its objective was to address poverty and social inequalities in neighborhoods by supporting local consultative structures. In 2011, these partners began deliberating on revised management and evaluation plans. Our research aims to understand how intersectoral actors reconcile their organizational and collective interests in such deliberative processes. This article proposes an approach to identifying and validating critical events in intersectoral deliberative processes. The method utilized to select the key critical events in 4-year deliberative process of the Initiative as well as the lessons learned are presented.

Critical events (CE) are defined as “any action that has had a positive or negative impact on the deliberative process of revising the policy framework”. Using secondary

data from the Initiative documents (minutes, evaluation reports, activity reports, working papers), we first identified in chronological order all events of the deliberative process between 2011 and 2015.

- A. The approach
  1. We organized a 1-h exploratory focus group with four Initiative partners involved in the 2011–2015 process to discuss and validate the proposed event timeline. In an invitation letter sent well prior, participants were asked to recall the deliberative process, and bring their old agendas, notes and other support materials. At the end of the focus group, we explained that we would review the event chronology with their new information to identify those they considered critical. After a brief reminder of the definition of “critical event”, a date was set for a second focus group.
  2. The data collected were used to adjust and consolidate the initially proposed event chronology and identify both the events considered critical (CEs) and the actors involved. The second focus group was used to validate critical events, delimit them in time and retain those considered essential. Participants were then reminded of the next step, individual interviews with all the actors involved in the selected CEs. Each participant agreed to inform relevant stakeholders in their respective sectors about the upcoming interviews, and to contact retired and former members and obtain authorization to share their contact information.

Upon reception of the contact information, an information and invitation letter was emailed to all potential participants and the interviews were scheduled and conducted. Participants received a reminder email including the interview protocol and a description of the CEs on which the interview would be based. Each potential participant

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was asked about the CE(s) in which he/she was involved. The individual interviews lasted between 35 min and 2.5 h.

## B. Lessons learned

### a. Bringing participants back in the past

Participants in the exploratory focus group were amazed at the number of events that had occurred during the process. Most of them had forgotten about some events in which they were involved. The preliminary review of the events served as a refresher, consequently facilitating the discussion by resituating them in the past process. Throughout the individual interviews, participants struggled to define the events, even though the list had been sent prior to the interview. Most participants found it difficult to describe in detail “an event” without mixing it with other events. Some were confused in the details of the events and switched from one event to another without realizing it, omitting important details. In this context, how to ensure that researcher and participants are talking about the same event? That answers provided refer to the event about, which the questions are being asked? First, the researcher must master the study objects to be able to differentiate the events and refocus participants. This underscore the importance of the exploratory focus groups and the in-depth study of documents. Second, frequent reminders were effective in bringing participants back to the events. However, reminders could sometimes create more confusion and some participants became so confused in their accounts that they wanted to give up the interview. In these situations, breaks were given to allow them to get back into the process.

### b. Adopting a strategic posture

Participants took advantage of the individual interviews to express their emotions about the process being studied. Some said they were satisfied with their involvement in the review process; others claimed to be disappointed; some were angry; others felt that they had simply played the game. We also found that participants’ responses to interviews varied with the emotions felt and experienced at the events. To facilitate interaction, we adopted different postures: keeping a distance from angry participants; demonstrating empathy and understanding in the face disappointment; smile or acquiescing to share the pride of satisfied participants. This strategy helped create a climate of trust, allowing participants to be open and authentic. Our

challenge was to remain focused on the subject matter, not on participants’ feelings. To do so, we logged difficulties encountered and our responses to respondents’ emotions. After each interview, we returned to the interview process to analyze our behaviors, reflect on their effects on the data collected, and plan strategies for subsequent interviews. Thus, through reflexive work of continuous questioning (Champagne and Clennett-Sirois 2016), we adjusted our posture strategically throughout the data collection to ensure its quality.

In the reconstruction of a deliberative process, all actions that have had a positive or negative effect on its progress can be considered as critical events. To understand them, the researcher must master the object of study well; use techniques to help participants locate themselves in the past and circumscribe events over time; and adopt a strategic attitude to ensure data validity.

## Compliance with ethical standards

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**Conflict of interest** Author A: Achille Dadly Borvil declares that she has no conflict of interest. Author B: Natalie Kishchuk declares that she has no conflict of interest. Author C: Louise Potvin declares that she has no conflict of interest.

**Ethical approval** All procedures performed in studies involving human participants were in accordance with the ethical standards of the institutional and/or national research committee and with the 1964 Helsinki Declaration and its later amendments or comparable ethical standards.

**Informed consent** Informed consent was obtained from all individual participants included in the study.

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