

Assessment in Focus: Conducting Effective Interviews and Focus Groups

Mariana Regalado, Maura Smale, Frans Albarillo

METRO, March 3, 2015

Qualitative Research Checklist

The process outlined here is iterative – as your research progresses you will need to return to previous checklist items to adjust, and that is OK! Be flexible! This list is not a recipe to follow, rather guidelines for getting started.

- 1) Develop a clear research goal(s).
 - a) What is the topic of inquiry?
 - b) How much is known about the topic?
 - c) What do you hope to learn?
 - d) Why do you want to learn that? What purpose will be served?

- 2) Write questions.
 - a) What kinds of responses do you hope to elicit with each question?
 - Grand tour questions: *What is it like for you to use the library? How do you do research?*
 - Reporter questions: *Where in the library do you study? When do you study there?*
 - Guided tours: *Walk me through how you search Google.*
 - Example/description questions: *Can you give me an example of a time you were frustrated at the library? Describe what it's like for you to . . . ?*
 - Experience questions: *Can you tell me about the kinds of experiences you have had with doing research for your homework?*
 - Perception questions: *How do you feel about the people who work in the library?*
 - b) Is there a sequence to the questions?
 - c) Open-ended <-----> closed: *Do you study in the library? --- When do you study in the library? -- - Tell me about your experience of the library . . .*
 - d) Prompts: *Have you checked out a Reserves book?*
 - e) Probing: *You say you prefer to read print books . . . Why is that? . . . Tell me about your experiences with ebooks.*
 - f) Avoid leading questions: *Don't you think the second floor of the library is too noisy?*
 - g) Practice or pilot your questions! Think about sequencing and question type: difficult questions should be in the middle of the session.
 - h) Special considerations for different populations, children and teens, sensitive topics (immigration), language (nonnative speakers), etc.

Interviewing is a skill that comes with practice. Transcribing and reading transcripts and taking notes right after the interview helps to improve these skills.

- 3) Draft your research plan.
 - a) Prepare a timeline for your project (subject to revision!).
 - b) Create an interview or focus group guide.

- 4) Assess the resources that are available to you.
 - a) How much time will your project involve? Note that grant or other funding deadlines may influence your project timeline.
 - b) Will you need funding? If so, how much, and where might it come from?
 - c) What kind of support will you need for this research?
 - d) Who are the stakeholders you need to have on board?

- e) What are your equipment needs? Is equipment dependent on funding?
 - f) Where will you conduct the interviews? Determine the quietest location you can!
- 5) Identify your participant population or sample.
- a) Who will participate in your interview? What are your criteria? How will you screen for that?
 - b) What sampling method will you use?
 - c) Is this population easy to access?
 - d) How sensitive is your topic?
 - e) Do you have a budget for incentives?
 - f) Will you be contacting this population just once? Or will it be multiple times?
 - g) How many participants will you need?
 - h) Will recruitment be online or in-person?
- 6) Secure the required approvals.
- a) Do you need IRB approval for your project? Start early to ensure that your project is not delayed.
 - b) Secure permission to conduct your study from site administration, especially if you are conducting the research at an institution that is not your own
- 7) Obtain any equipment you will need.
- a) If you are recording you will need an audio recorder, video camera, or screen capture software.
 - b) If you plan to transcribe recorded information to text, you may need transcription supplies like a foot pedal and specialized software. Alternatively, you might hire a transcription service.
 - c) Don't forget to budget for office supplies, including photocopying for instructions and flyers, large sheets of paper and pens for participant drawings, etc.
 - d) Consider where you will store and back up both physical and digital files, and remember that recorded and image files can be quite large. If you are collaborating with others it may be worth paying for a file storage and sharing service such as Dropbox or SpiderOak.
- 8) How will you compensate or incentivize participants in your research?
- a) For a short, one-time interview or focus group, especially with students, providing food (pizza, candy, snacks) and drinks is often sufficient.
 - b) Other incentive possibilities include coffeeshop or bookstore giftcards in small denominations (e.g. \$5-20), flash drives, or other useful items.
- 9) Recruit participants.
- a) Create recruitment materials and promote your research study via email, the web, and/or in print, also word-of-mouth or individual outreach.
 - b) Once participants are recruited, be sure to communicate the date, time, and location of interview.
 - c) Participants can be forgetful – it's worth the effort to remind them 1-2 days before the interview.
- 10) Collect your data.
- a) Strive to have a backup plan and be prepared for the unexpected!
 - b) Use a consistent file-naming convention for your files to make it easier to store and retrieve your data for analysis.
- 11) Post-data collection wrap-up.
- Be sure to follow up with any stakeholders or those who assisted during your project to thank them.