

# Using Qualitative Interviews in Evaluations: Introduction to Interview Planning

Part 1 of 2

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# Goals of the Two-Part Series

## ■ Part 1

- Help you decide whether to include interviews in your evaluation design
- Outline the steps associated with using qualitative interviews as part of a rigorous evaluation
- Highlight key logistical decisions (the 5 “Ws”) associated with planning high-quality interviews

## ■ Part 2

- Discuss what you should ask in the interview and how you can collect high-quality interview data
- Offer guidance on how to define and recognize high-quality data
- Discuss strategies you can use to ensure high-quality interview data are collected and utilized

# Getting Started: Know Your Evaluation Needs & Goals

- Start with a comprehensive evaluation plan
  - Logic model or theory of action
  - Evaluation questions
  - Variables, or specific data points whose value may change over time (e.g., participant knowledge)
  - Evaluation design
  - Data sources
  - Data collection techniques
- Establish evaluation questions, variables, evaluation design, and data collection techniques as early as possible!

# Getting Started: Identify the Available Resources

- Time
- Staff
- Budget
  - Travel
  - Data collection (including incentives)
  - Data management and cleaning
  - Data analysis
- Recruiting participants, conducting interviews, and analyzing the data can be resource intensive.

# Getting Started: Identify the Right Data to Answer Your Evaluation Questions

- Identify which data sources will provide the best information for your evaluation
- Whenever possible, use multiple data sources and triangulate findings
  - Triangulation: Process by which data from multiple data collections (different techniques, events, sources) are used to test or confirm findings or to fill knowledge gaps

# Getting Started: Decide Whether to Include Interviews

- Why conduct interviews?
  - They provide rich descriptive and contextual data
  - They can be helpful when exploring concepts—establishing the depth and breadth of experiences and phenomena
  - They may provide hypotheses or theories that can be tested or verified in later aspects of the evaluation
  - They can provide data that can be used to triangulate findings from other data collections (e.g., surveys, observations, assessments, extant data)

# Pros & Cons of Interview Data

Pros	Cons
Interview data can provide rich, detailed information about a topic of interest.	Interview data collections are resource intensive—as are the analytic techniques.
Interview respondents can describe experiences or phenomena in their own “voices.”	It may be difficult to identify, eliminate, or manage bias in respondents’ answers.
Interviewer can probe certain topics in more depth to achieve clarity on responses or explore new topics that emerge.	Interviewer may ask different questions of different respondents, leading to possible lack of uniformity or comparability across their responses.
Interviews can be scheduled to fit both interviewer and interviewee schedules.	A complete set of interviews may require an extensive period of time to complete.

# Practical Example

- The project: Provide training in a new reading program to teachers (available in face-to-face, online synchronous, and online asynchronous modes).
- Goals of the evaluation:
  1. Determine the quality, relevance, and usefulness of trainings
  2. Determine the extent to which training opportunities (overall and by mode) have:
    - a. Improved teacher knowledge,
    - b. Improved teacher practice,
    - c. Contributed to improved student performance in reading.
  3. Determine how the trainings can be improved.



# Practical Example (cont.)

- The design: Mixed-methods, quasi-experimental, pre-post design
- The data are shown in the table below...

Evaluation Focus	Quantitative	Qualitative
Quality, relevance & usefulness of training	Training evaluation forms	Interviews
Improved teacher knowledge	Pre-post measures of knowledge	Interviews
Improved teacher practice	Surveys	Observations Interviews
Improved student performance	Pre-post measures of performance	Interviews

# In our example, interviews may help the project triangulate across data sources and...

Quantitative	Qualitative
Training evaluation forms	Interviews
Pre-post measures of knowledge	Interviews
Surveys	Observations Interviews
Pre-post measures of performance	Interviews

- Interviews can help projects understand the level of and factors associated project implementation
- Explore participant perceptions of and reactions to training
- Explore the extent of change in teacher practices
- More thoroughly investigate differences between modes of training delivery (face-to-face, online synchronous, and online asynchronous)
- Establish or confirm facilitators or barriers to achieving the project's outcomes (i.e., improved student performance in reading)

# The 5 “Ws” of Planning High-Quality Qualitative Interviews

1. **Who** should you interview?
2. **Where** should you conduct the interviews?
3. **When** should you conduct the interviews?
4. **What** should you ask in the interview?
5. **How** can you collect high-quality interview data?

# WHO should you interview?

- Use your evaluation plan to identify the specific variables that your data collections must provide
- Determine which individuals have specific information aligned with one or more variables
- If it's not necessary (i.e., you have other valid and reliable ways to collect all the data you need) or practical to collect interview data, don't conduct interviews!

# Let's revisit our example and examine our evaluation goals...

## Goals:

1. Determine the extent to which training opportunities (overall and by mode) have:
  - a) Improved teacher knowledge,
  - b) Improved teacher practice,
  - c) Contributed to improved student performance in reading.

Who should be interviewed? Why?

# Logistical Considerations: Selecting Participants

- How many people do you need to interview? How many people can you afford to interview?
- Can you utilize a sampling framework to interview a manageable pool of participants? Can you interview a cross-section of participants?
  - **Random sampling** — Randomly selecting interview participants from a larger population of possible respondents
  - **Stratified sampling** — Dividing the larger population into groups based on specific characteristics (e.g., role in the school, gender, ethnicity) and then selecting interview participants from within each group (randomly or purposefully)
  - **Purposeful selection**— Selecting interview participants based on whether they can provide the information-rich data about the topics of interest

# Logistical Considerations: Recruiting Participants

- Plan to devote time to participant recruitment
  - Work with stakeholders to strategize recruitment
  - Provide participants with information about the study and the purpose of the interviews
  - Follow up by phone or email to schedule interviews
- Maximize participation by
  - Emphasizing the importance of participants' time and information to the success of the evaluation
  - Building incentives into your evaluation budget
  - Selecting an interview mode for individual interviewees that facilitates participation

# WHERE should you conduct the interviews?

- Interview modes:
  - **In-person** — Interviews conducted face-to-face with individuals
  - **Telephone** — Interviews conducted over the phone
  - **Web-mediated** — Interviews conducted using an internet videoconferencing platform
  - **Online/chat** — Interviews conducted via email or through an instant messaging or chat program



# Let's revisit our example and our data sources...

- Potential respondents include:
  - Teachers
  - Administrators
- What factors would we need to consider when deciding where to conduct the interviews?
  - Accessibility
    - Physical site accessibility (e.g., wheelchair accessible)
    - Access to technology (e.g., Section 508 compliance, software, hardware)
    - Access to interpreter (e.g., availability, cost)
  - Budget
    - Travel costs (e.g., distance to participants, lodging)
    - Staff time (e.g., scheduling, travel time, interview duration, transcription)

# Logistical Considerations: Selecting the Interview Mode

Interview mode	Pros	Cons
In-person	Allows observing body language and establishing a personal connection with participant	Require travel (local or long-distance), can be difficult to schedule, and can be expensive
Telephone	Allows data collection to occur across multiple, dispersed locations; cost efficient	Can be difficult to obtain unlisted telephone numbers, phone calls may go unanswered or directly to voicemail, can be difficult to establish rapport with respondents
Web-Mediated	Allows for face-to-face interaction across multiple, dispersed locations; cost efficient	Videoconferencing can be unwieldy with multiple respondents (bandwidth), may be difficult to schedule, cannot include respondents without internet access
Online/Chat	Allows asynchronous or synchronous conversations to occur across multiple, dispersed locations; can be more convenient for respondents; cost efficient	May be difficult for the interviewer to monitor responses or to moderate a discussion, allows respondents to choose which answers they respond to and ignore others, may require that all respondents have the same software (chat), cannot include respondents without internet access

# WHEN should you conduct the interviews?

- Depends on the type of data you want to collect: exploratory or confirmatory
  - Exploratory data collections occur in the planning or formative stages of a project and can be used to:
    - Establish the boundaries of experiences and phenomena
    - Provide concepts and ideas that can be expanded upon or verified in later data collections
  - Confirmatory data collections occur in the summative stages of the project and can be used to:
    - Confirm depth and range of experiences across a range of participants
    - Verify a project's results or outcomes

# Let's go back to our example and our data sources...

- Potential respondents include:
  - Teachers
  - Administrators
- What types of interviews might we conduct for formative purposes and for summative purposes?
  - Formative: Exploratory interviews that gather participant perceptions of the quality, relevance, and usefulness of trainings
  - Summative: Confirmatory interviews that assess whether or not desired project outcomes are achieved

# Logistical Considerations: Determining Interview Frequency & Breadth

- What variables are the interviews providing?
- How often are these variables needed?
- How much data can you afford to collect and analyze?
- When the budget is small:
  - Use interviews in combination with other, more cost-effective data collections (e.g., surveys)
  - Focus the interviews around core questions and minimize the length of the interview
  - Minimize the use of unstructured questions
  - Choose cost-effective interview modes (e.g., telephone, online)

# WHAT should you ask in the interview?

- Interview questions should elicit the data necessary to answer your evaluation/research questions or triangulate findings
  - Questions need to target specific variables of interest
  - Questions may support the formative and summative aspects of the evaluation
- Follow an interview protocol to
  - Ensure all participants answer the same core questions
  - Ensure the interview will elicit the information needed to answer the evaluation/research questions.

For more information, check out Part 2 in the webinar series!

# HOW can you collect and use high-quality interview data?

- Create an interview protocol to provide precise data that align with evaluation questions.
- Make efforts to reduce response bias throughout the interview.
- Train (and re-train) interviewers to elicit complete and information-rich answers.  
Screen data for quality DURING the interview.
- Capture responses accurately and completely.
- Conduct rigorous qualitative analysis.
- Create a report template for compiling the interview data.

For more information, check out Part 2 in the webinar series!

# Final Thoughts

- Interview data are often good for addressing "how" questions, "why" questions, barriers/facilitators, best practices, and lessons learned
- It's essential to know your evaluation needs, goals, and budget when planning to conduct interviews.
- Your evaluation plan can help you identify the specific variables that your data collections must provide.
- Knowing what data you need to answer your evaluation questions can help you identify who you need to interview.
- Consider the 5 "Ws" when planning your interviews and use strategies to ensure you collect high-quality data.



# For More Information...

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- Patton, M. Q. (2015). *Qualitative research & evaluation methods (4<sup>th</sup> ed.)*. Thousand Oaks, CA: Sage.

# Questions?

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