

SI 501 F21: Week 4

Agenda

- Discussion of readings
- Introduction to interviewing
- Interview protocols
- Interviewing and note-taking
- Observations

Course Overview

		Contextual Inquiry	Consulting	Qualitative Research
Week 1	501 Hunt	X	X	X
Week 2	Team dynamics and planning		X	
	Client contact plan		X	
Week 3	Professionalism		X	
	Background research		X	X
Week 4	Interviewing and protocols	X		X
	Observation	X		X
Week 5	Interpreting interviews	X		X
Week 6	Models and analysis	X		X
Week 7	Affinity diagrams	X		X
Week 8	Brainstorming solutions	X	X	X
	Secondary interviews	X		
Week 9	Affinity wall walkthrough	X		X
Week 10	Optional / check-in			
Week 11	Presentations & reports		X	X
Week 12	Team presentations		X	
Week 13	Conclusion	X	X	

Discussion

- How long should you plan for an interview and observation?
For this course, you will aim for 60-90 minutes.
- What attitude should you adopt when you conduct an interview?
- What kind of responses do you want from your interviewees? How do you increase the likelihood of getting them?
- How can you phrase questions when you're asking about past events?
- What does Weiss (1995) mean by a "marker"?
- What challenges might you experience when conducting an interview? What can you do when an interview is going badly?
- What ethical obligations do you have to the interviewee?
- What did you find in the readings that was surprising or unexpected?

Differences Between Readings and SI 501

Readings

- Give an **introductory group talk**.
- Length of interview & observation: **2 hours**
- Interviews are conducted by **one person** doing interview and taking notes.
- Give the interview participant **a small gift**.

SI 501

- **No group talk**.
- Length of interview & observation: **60-90 minutes**
- Interviews are conducted by **two people**, with one doing interview and the other taking notes.
- **No gifts!**

Differences Between In-Person and All-Virtual

In Person

- Interviews happen **in person**, at the interviewee's normal place of work.
- Part of the interview involves an **observation** of the work as it happens.
- **Pen-and-pencil note-taking** is encouraged, because screen can create a barrier with interviewee.

All Virtual

- Interviews happen **online** (e.g., Zoom).
- Conduct observation online **if possible** with shared screen.
- **Note-taking on laptop OK**, though be careful to maintain eye contact as much as possible. (Pen-and-pencil still worth trying, though.) Note-taker should mute themselves most of the time.

How are client meetings going?

Questions about Background Research Report?

Any other questions?

Whom should you interview? When?

People involved directly with the problem or process in question.

People who play 3 *different* job roles with respect to the problem.
People who have a say with respect to the issue, as well as people affected by the issue.

Best time for interviews is Oct. 11 – Oct. 29 , but as early as Oct. 5 or as late as Nov. 5 is OK. This is because you want to have your interview protocol ready and also have time to do interpretations before we begin analysis with affinity walls.

Exercise 1

(Online students: Take a screen shot of this slide, so you have it when you go to breakout rooms.)

Form a group of 3-4 people – avoid team members.
(Online people will be put into breakout rooms.)

Introduce yourselves to each other before you start.

Choose one person to be the interview er.

Choose another person to be the interview ee.

The other people in the room should observe

and take notes.

**The interviewer should conduct an interview
with the interviewee for 5 minutes.**

No further instructions!

Discussion

How did it feel as the interviewer?

As the interviewee?

What did observers observe?

**What, if anything, felt strange or uncomfortable
about the interview?**

What could be done differently?

Exercise 2

(Online students: Take a screen shot of this slide, so you have it when we go to breakout rooms.)

Stay with the same group.

Choose a different person to be the interview er.

Choose a different person to be the interview ee.

Conduct another interview for 5 minutes.

Take notes on pen and paper.

Pick one of the topics below:

- An embarrassing event that happened since the interviewee arrived at UMSI.
- The class you're taking now that the interviewee likes least (other than SI 501).
- Someone the interviewee finds attractive, who is *not* a famous person.

Discussion

How did it feel as the interviewer?

As the interviewee?

What did observers observe?

**What, if anything, felt strange or uncomfortable
about the interview?**

What could be done differently?

Interview Protocols

- An interview protocol is a guideline for how you plan to conduct an interview.
- It will contain an introduction, a set of questions, and a conclusion.
 - Introduction: interview goals and content, interview duration, confidentiality, voluntary nature, audio recording permission, etc.
 - Key questions + follow-up questions: for each interviewee (or interviewee type), a set of carefully crafted and organized questions.
 - Conclusion: interviewee questions, contact information, follow-up after interview, thank yous, etc.
- In contextual inquiry, we conduct *semi-structured interviews*, so the set of questions are only guidelines. You will deviate frequently from the protocol to follow up interesting leads, and to otherwise adjust based on the responses. You will generally *not* ask the protocol questions one after the other. However, the protocol will be useful as a guide for you, and as a safety net of questions, in case you need it.

Exercise 3

(Online students: Take a screen shot of this slide, so you have it when we go to breakout rooms.)

On your own, develop a series of key questions that would form the core of an interview protocol.
(For now, don't worry about the introduction or the conclusion.)

The interview goal is to understand instances when the interviewee (the person being interviewed) had difficulty figuring out how to use a website or a smartphone app, and how they responded to those instances.

Do this silently and on your own. You have 5 minutes.

Discussion

What questions did you include?

What kinds of responses do you think they would elicit?

Did you think about how the questions should be worded so as to encourage more revealing or interesting responses?

Did you think about the ordering of the questions and if so, how did you organize them?

Interview Protocol Guidelines

- Have an overarching question in mind. Write it out explicitly.
- Create a list of *key questions*.
- Cluster them by theme.
- Think through the ordering of themes and the ordering of questions within themes.
- Include *follow-up questions* for each key question, to dig deeper, or to ensure that you get the responses you need.
- Consider how best to ask the participant to re-enact an experience from the past.
- Most questions should...
 - Be relevant for answering the main question;
 - Be mostly open-ended;
 - Be non-judgmental;
 - Be phrased to avoid sounding like they are attacking or evaluating the participant;
 - Elicit concrete responses, and not abstract generalizations (e.g., “Could you tell me about the last time when...?”);
 - Avoid leading the participant into thinking that you are looking for a particular answer;
 - Show that you are adopting the stance of a learner / apprentice.

The First Rule of Strategic Thinking

Whatever it is that you're doing, be clear about the **main goal** of the activity.

- If unsure of main goal, take time to figure it out.
- Without a main goal, any further effort might not be worth it.
- You can only have one main goal.
 - If you think you have two or more goals, ask yourself which one is the *most* important to you. Sometimes, two or more goals can be merged and restated as a single, larger goal.
- Main goals can nest within one another (*i.e.*, goals can have subgoals). In such a situation, choose the right level goal to focus on.
- Make decisions based on your main goal. Use your main goal to *prioritize*.
- In some cases, you may have hard constraints (e.g., ethical or legal) that take precedence over your main goal.
- You can have (non-hard-constraint) secondary goals. But, whenever your main goal and any secondary goals are in competition, choose in favor of your main goal.

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Exercise 4

(Online students: Take a screen shot of this slide, so you have it when we go to breakout rooms.)

Revise and re-organize your series of questions from the previous exercise with your group. Make sure you have a good overarching question. You'll have ~7 minutes.

Again: The interview goal is to understand specific instances when the interviewee (the person being interviewed) had difficulty figuring out how to use a website or a smartphone app, and how they

Guidelines:

- Write out an overarching question explicitly.
- List the key questions. These should...
 - Be relevant for answering the main question;
 - Be mostly open-ended;
 - Be non-judgmental;
 - Be phrased to avoid sounding like they are attacking or evaluating the participant;
 - Elicit concrete responses, and not abstract generalizations (e.g., "Could you tell me about the last time when...?");
 - Avoid leading the participant into thinking that you are looking for a particular answer;
 - Show that you are adopting the stance of a learner / apprentice.
- Add follow-up questions. (These can bend the guidelines above somewhat.)
- Cluster and organize the key questions in some logical order.

Discussion

What kinds of changes did you make?

What kinds of changes were difficult to make, if any?

Any questions about generating good questions for an interview protocol?

(Online students: Take a screen shot of this slide, so you have it when we go to breakout rooms.)

Exercise 5

Breakout rooms again. Pick someone to be interviewer; another person to be interviewee; others will be note-takers.

Conduct an interview, using the protocol questions as a guideline. You have 7 minutes.

Note-takers: You will need to share your notes with everyone else in the breakout room after these exercises are over. Please make sure you have emails of all group members, and that you take good notes!

Discussion

How did the interviews go?

How did having an interview protocol affect your interview, especially compared with the first interviews you did today?

What kind of challenges did you face in the interview?

Were you able to get satisfactory answers to the overarching question?

Exercise 6

(Online students: Take a screen shot of this slide, so you have it when we go to breakout rooms.)

Find a new partner who is *not* in your team.

(Or, form a group of 3.)

Decide which of you will **observe the other.**

The person being observed should work on an assignment they have to do for another class.

(Online students: Do this on Shared Screen.)

The observer should **silently take notes, trying to capture the way the observed person goes about their work.**

Discussion

How did it feel as the observer?

As the observed person?

If you were the observer, what kind of notes did you take?

What, if anything, felt strange or bad about the observation?

What could you do differently?

Exercise 7

(Online students: Take a screen shot of this slide, so you have it when we go to breakout rooms.)

Swap / rotate roles.

The person being observed should work on an assignment they have to do for another class, but this time, **talk through what they are doing as they are doing it.**

The observer should take notes, but this time, the observer should feel free to ask questions during the observation, to better understand what the observed person is doing, and why they are doing it.

Discussion

How did this feel in comparison to the previous observation exercise?

What was worse?

What was better?

What could you do differently?

For next week (Oct. 4)

Interview protocol assignments due! Carefully read the assignment and sample protocol in Canvas. There are components to a complete interview protocol that were not practiced explicitly in class.

Submit any work you have done **toward your Background Research Report** .
Recommendation is to add *an outline and/or a few hundred words*.

Carry on with **client meetings**, set up interviews and observations if possible. **Best time for interviews is Oct. 11 – Oct. 29**, but as early as Oct. 5 or as late as Nov. 5 is OK.

No readings for next week; that also means no quiz. Yay!

Please come to next week's class with all of your interview notes from today; everyone in each group should have the notes taken during in their group (even if someone else took the notes).

In Discussion Section

Ask your GSI, if you have *any* questions about client meetings, Background Research Report, or interview protocols.

Start working on your **interview protocols**. Read the Interview Protocol Assignment instructions carefully. Discuss with your team.