

OPM/IRS Immersive Design Studio

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Tuesday. Late Morning. Qualitative Research.

Qualitative and Quantitative Research

Qualitative Research is...

“...a field of inquiry that crosscuts disciplines and subject matters. Qualitative researchers aim to gather an in-depth understanding of human behavior and the reasons that govern human behavior...Qualitative research investigates **the why and how of decision making**, not just what, where, and when.” — Johns Hopkins’ General Internal Medicine website

Qualitative and Quantitative

Quantitative Data

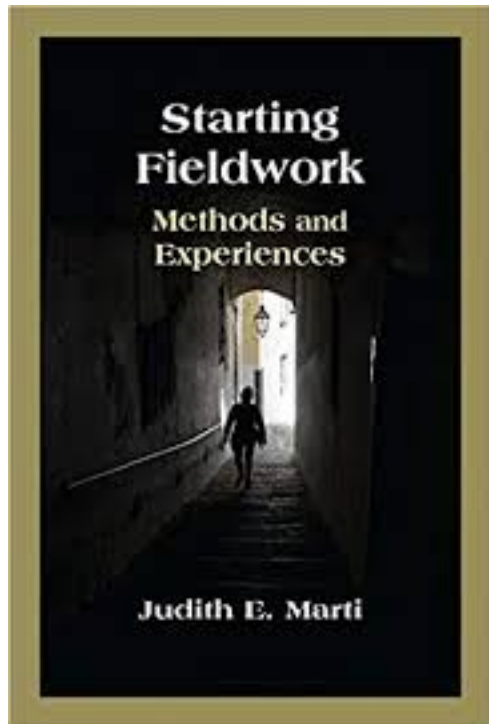
WHAT ?

Qualitative Data

WHY ?

HOW?

Who practices or uses qualitative research?



Census Bureau

Problem: Undercount of people living in some urban households.

Ethnographers came on the job and found...

- * complex household arrangements that didn't fit “cookie cutter” census question format
- * mobility
- * distrust of government
- * limited English

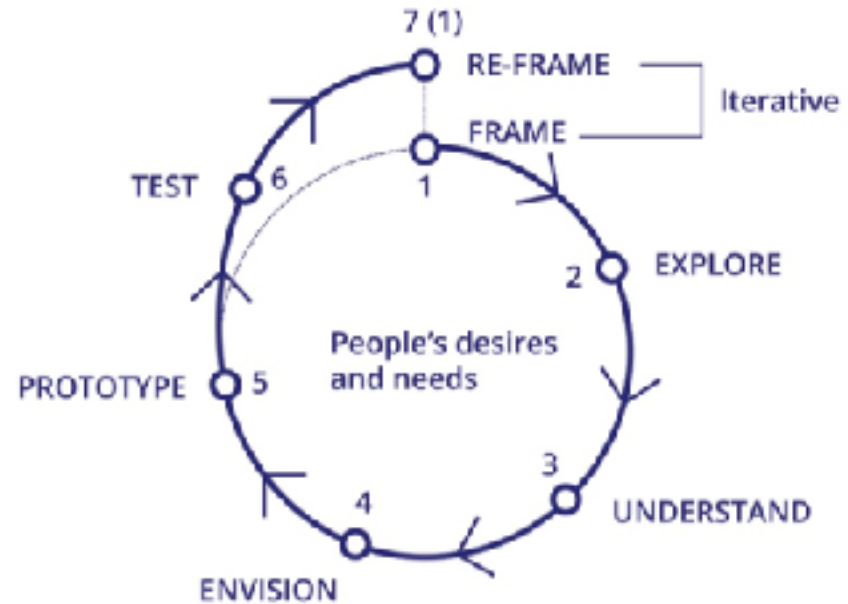
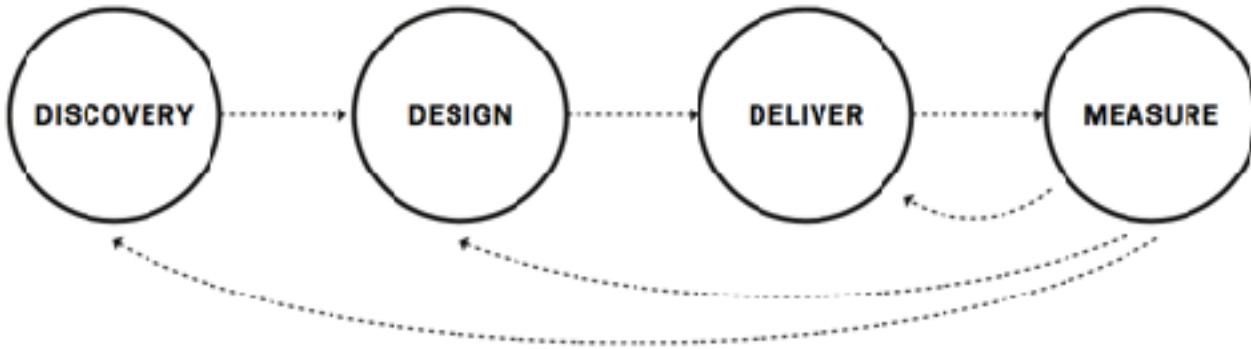
Census

Census Bureau made changes.

- *Rewrote the question to how many people are “living or staying” at the household
- * Offered questionnaires in different languages
- *Expanded partnerships with local organizations to build trust for census.

Human Centered Design is...

the discipline of navigating complex problems and creatively designing effective solutions to meet people's real needs.



Gallery Walk. Veterans Journey Map project.

Tuesday. Afternoon. Qualitative Research.

Qualitative Research: An Introduction

Secondary Research

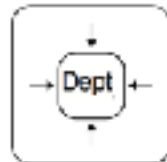


Academic Research

Find out what people have already done in your topic area. Use search engines like Google Scholar or Academia.edu and publications like the Harvard Business Review, the Stanford Social Innovation Review, and the MIT Technology Review to find projects related to your subject. Read the abstracts of articles that sound interesting, then check those papers' bibliographies to find additional articles and works.

Statistical Research

Statistical research can help you properly frame your area of interest. Looking up historical statistics will allow you to understand if your problem frame should widen out or focus in. Remember: *backwards* evaluates the source of your data so as to maintain data hygiene and fidelity. Data hygiene refers to the quality of the data collection and interpretation. Data fidelity refers to the precision with which the data has been recorded. If you see data collection or interpretation you think is illogical or messy, move forward and find better data on which to base your work.

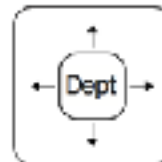


Internal Research

If your project addresses or extends a program or set of programs already underway in your organization, look them up to see what's already being done. Ask the program leaders, review their documents, and, if possible, observe the working group and their activities in the field. This process will help you frame your approach appropriately so to avoid work duplication and increase to your contribution to work already in process.

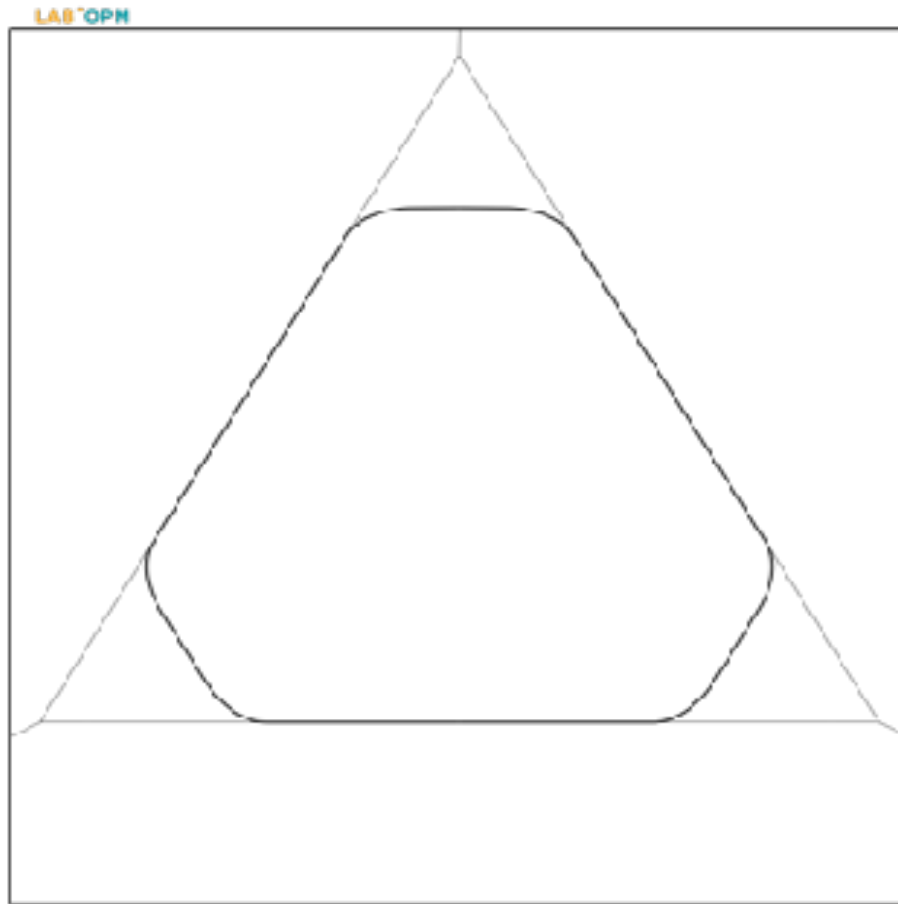
External Research

External benchmarking means seeking out and studying existing programs outside of your organization. Look at all sectors to find them: private, non-profit, academic, or even other parts of the public sector. Through learning what others are developing, you will be able to frame your project in a way that builds on this work. Additionally, by notifying others of your work, you will contribute to the community of knowledge on your subject.



Facts, assumptions, & biases

DEFINING THE PROBLEM SPACE



Facts, assumptions, & biases



“What people say and what people do and what they say they do are entirely different things.”

Margaret Mead
— Anthropologist



In their shoes



Observation



Sketch and Document



Observation Tips

- **Observe the big picture. Look at the larger environment and detect relationships between the parts and the whole.**
- **Observe the details. Focus on specific aspects that may provide clues. Be Sherlock Holmes.**
- **Consider hidden connections. Look for hidden forces that may be shaping the scenario at hand.**
- **Observe with your senses: sight, smell, sound and touch.**

Contextual Inquiry



Interviewing



In-depth and structured



- Each person asked the same question in the same way so that any differences between answers are held to be real ones and not the result of the interview situation itself.
- No deviation from question order or wording of questions.
- No adjusting for level of language.

Semi structured



- Questions are normally specified, but the interviewer is freer to probe beyond the answers.
- Questions may be reordered during the interview.
- Level of language may be adjusted.
- Interviewer may add or delete probes.
- Allows people to answer more on their own terms, but still provides a structure for comparability.

Open ended interviewing



- Includes life-history, biographical and oral history interviews
- Sometimes called informal
- Provides qualitative depth in allowing subject to talk about topic within their own frame of reference

Interviewing Tips

- **Interview in pairs (interviewer and recorder)**
- **Use facial expressions not sounds**
- **Tell me more & Diane Rehm's echo**
- **Allow for silence. Get comfortable with it.**
- **No rescuing. "Did you mean to say...?"**
- **When you do need to interrupt (the Faucet)**

Close ended questions do the job of..

- **gathering quantitative data to fill out demographic profile**
- **helping you understand larger context and backdrop against which people tell their personal story**
- **helping to warm up the interview and put interview back on neutral or level ground, when that's needed**

Open ended questions do the job of..

- **uncovering people's point of view (“the way that I see it is...”)**
- **revealing what people think, believe, and value**
- **revealing how people make sense of what has happened to them/their experiences**
- **revealing key metaphors, images, and ethical codes that most resonate with people or groups of people**

Planning for Qualitative Research

4 W's and 1 H

- **What** question are you aiming to answer or what issue, topic, pattern, or dynamic within a system or service do you want to understand more clearly and deeply?
- **Who** are the people whose perspectives, roles, or angle on the research question can help illuminate that question?
- **How** are you going to go about your qualitative research? Who will be on your qualitative research team?
- **When** will you realistically need to do your research and what is the sequence and flow of your research?
- **Where** do you need to go to do your research? Does your research effort involve a single site or multiple sites?

Scale of Effort

Small Scale

A Small Scale project is one in which you have one research team of 2-3 teammates, a single, individual stakeholder, such as a WAMC Director, a single location, such as a WAMC, and a single deliverable.



Teammates

Teams should always be at least two people: one person to perform RCD interviews, one to take notes.



Stakeholder

A stakeholder can be the person who gave your team the initial project brief or person who is a regular project partner with your office and approached you or your leadership with a specific project, or someone you or your leadership approached.



Location

Understanding the physical location of research matters. Physical location can mean buildings, but it can also be virtual. The internet is a real place.

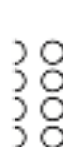


Deliverable

Deliverables can include reports, lists, white papers, journey maps, or a variety of other outputs from a project. When you begin, work with your stakeholder to define this term but not its content. The deliverable content must accurately and minutely reflect your research, including the voice of the research participants and any other group(s) studied.

Large Scale

A project has more than two research teams, multiple Stakeholders, locations, and deliverables. Projects will require substantial pre-production and in-flight logistical support.



Teammates

Large teams at the project level can be managed in a variety of ways, including a project manager, a project sponsor, a project steering committee, and a project charter. If you are not sure the project team is the right size, consider using your leadership to guide the project team into a more effective structure.



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Scale of Effort

Small / Medium Scale

A Small / Medium Scale project is one in which you have one research team of 2-3 teammates, multiple stakeholders, and either a single, complicated deliverable or a few smaller ones.



Teammates

For a Small/Medium scale project, a single research team of two to three people is sufficient.



Stakeholder

The Stakeholder count should still be quite small, a maximum of two individuals or groups.



Location

A Small/Medium scale project should be limited to a single research location.



Deliverable(s)

A deliverable in a Small/Medium scale project could be a single, difficult or multi part task, like the evaluation of a long standing system and recommendations on how to change it, or the documentation and compilation of several different work processes for review. If your deliverables sound similar to the scale of these tasks, then you know you have a Small/Medium scale project instead of a straight

Scale of Effort

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Multiple Teams

If you have multiple teams in the field, have ways for each team to report their findings on a weekly basis. This can be a shared document, a template document, or a template slide deck. Reporting on a regular cadence ensures that data is not lost in the course of the teams' activities.



Individual Stakeholders
Institutional Stakeholders

A big stakeholder group immediately means a big project scale / scope. Keeping your stakeholders informed, involved, and aligned is a messy and energy-intensive task. If you do not have the bandwidth to do this, consider asking your leadership if you and the team could break the project down into several smaller projects.



Multiple Locations

Lots of locations means a lot of travel. This brings with it several potential problems, including submitting for and receiving travel permits, forecasting insurance or flytime, and considering team members' energy levels. If at all possible, never have team members travel and perform research all in one day. It's a recipe for team exhaustion, and the quality of your research will suffer.



Multiple Deliverables

Deliverables at this scale require time to produce. Be sure to build in production time at the end of your research process to make the deliverables that your mission, your leadership, and your stakeholders deserve. Do not risk all your hard work by not giving yourself enough time to make excellent deliverables. Allow yourself to deliver strong outputs that reflect your work quality.

Recruitment Plan

Finding and Recruiting

The focus of your research project determines who you recruit and how many people you recruit. Additionally, your recruitment effort should aim to capture a wide net of perspectives on the issue that is the focus of your discovery research. Consider recruiting people of different service branches, ages, ethnicities, genders, and life circumstances so as to capture a breadth of experience and perspectives

Partnerships

Partner with the facility, union(s), and/or organization you're studying. Find a point of contact who can help you recruit research participants. Be clear with them about your needs. Communicate with your partners consistently to ensure that they understand who you're researching and what you need to complete your research.



Screening Candidates

One way to discern whether an individual is a match for your research topic is to have a short conversation with them. Ask them to tell you their story. Use open ended questions, like, "Can you tell me a time when..." or simply, "Tell me about a day in the life at your agency."

This also gets directly into the touchpoints or pain points you may want to study. Questions like this ensure that you identify participants whose experience is pertinent to your work. It's fine if the individual is not a strong match. It saves your time and the individual's time. Thank them for their interest in the project and for sharing their story, and ask if they are open to you contacting them in the future for other research projects.

Introduce your project

Introducing the project

Hi, Ms./Mr. _____ [interviewee name -- use Ms./Mr. until the interviewee asks you to use a less formal title]. This is _____ [your full name], and I'm a [title] with Insight & Design at the Veterans Experience Office. Thank you so much for making the time to talk with me—is now still a good time?

Introducing the project

I'd like to give you a little more information about our conversation today. We in the Veterans Experience Office are looking at the journey of transitioning Service members' effort to find meaningful employment after separating from the military and completing their service. The goal is to better understand the Service members' employment journey so that federal agencies can be more responsive to supporting them in that endeavor.

We understand you have really great insights on this topic, so we're really grateful for the chance to talk with you! Do you have any questions on that piece, before we talk just a bit more about interview logistics?

About the interview

So just a little bit more housekeeping, and then we can get started.

We're scheduled to talk for about 60 minutes today, and your participation is entirely voluntary. What this means is you're totally free to decline to answer any of our questions. We can also stop the interview at any time. As we talk, I just want to emphasize that we're

Closed and open ended Questions

1 BACKGROUND Can you share some basic context on your military experience?	<ul style="list-style-type: none">• First name, last initial (or alias)• Military branch• Enlisted or officer• Whether served in combat• Where served
2 TIMELINE Walk me through the timeline of your military life and career.	<ul style="list-style-type: none">• When did you decide to join the military, and what influenced your decision?• What milestones can you share about your experience in the military?• When did you decide to separate, and what influenced your decision?
3 PREPAREDNESS How prepared do you feel about the next phase in your life?	<ul style="list-style-type: none">• What tools or resources are you using/did you use in your effort to find meaningful employment? Do/did you have anyone help/mentor you along the way?• What are you most concerned with right now?• What do you feel you still need help with?
4 SKILLS APPLICATION Are you staying on or switching tracks?	<ul style="list-style-type: none">• Did you find work in something different from what you did in the military?• How do your military skills translate in the context of civilian life?
6 MAGIC WAND What would you do differently?	<ul style="list-style-type: none">• If you had a magic wand, what's the one thing you would change about the TAP curriculum?• Why would you make this change?

Studio Time