

# ***Beyond the Survey***

## *Qualitative Research Practices and Techniques*

*Ohio Health Sciences Library Association Virtual Workshop*  
*April 17, 2020*

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HELLO!



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A red ribbon graphic with a white border, containing the text "HELLO!".

HELLO!

## *Your turn!*

In the chat, please share your name, role, library system, and one thing you're hoping to learn from this workshop.

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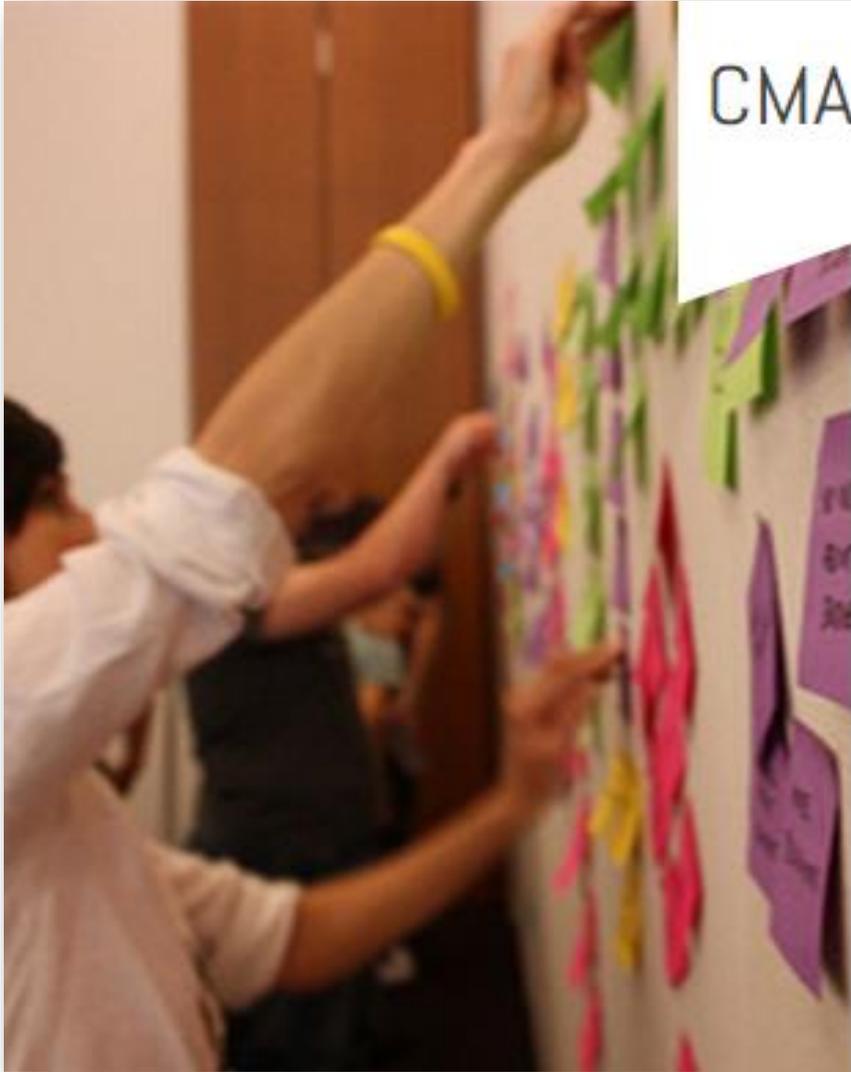




# How we work



CMA WAY





- Setting the stage for research projects
- Collecting qualitative data
- Writing interview questions and guides
- One-on-one interviewing techniques
- Analyzing and reporting
- Q&A

# LIFE CYCLE OF A PROJECT



# LIFE CYCLE OF A PROJECT

## *Front-end*

Exploring  
"I have an idea"  
Open-ended  
Concept testing  
Focus groups

## *Formative*

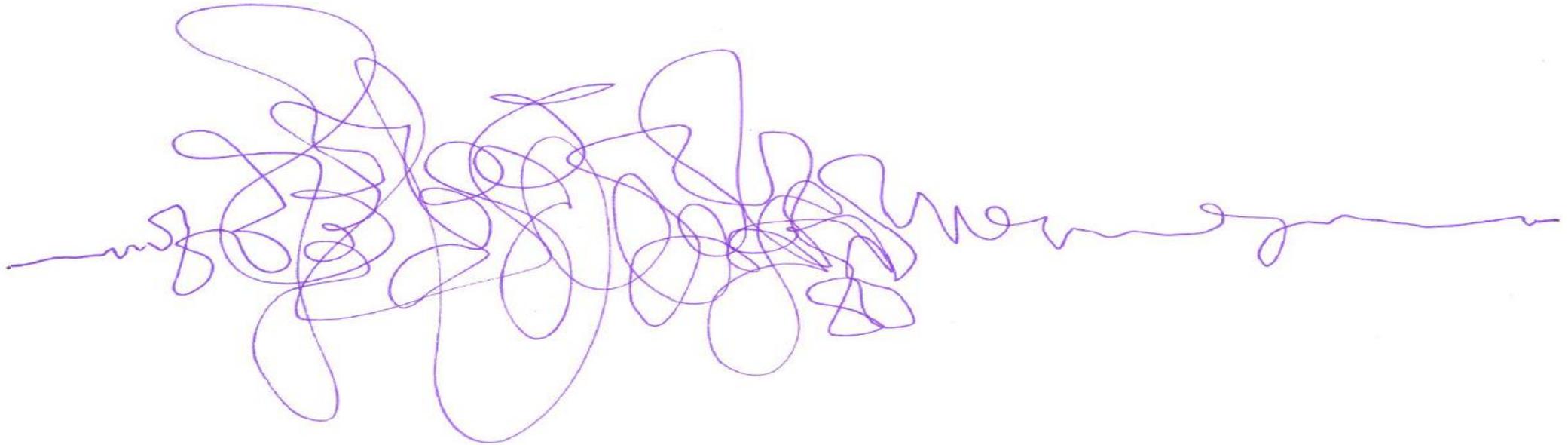
Solidifying  
"But will it work?"  
Prototyping  
Survey research  
UX testing

## *Remedial*

Tweaking  
"We can change that!"  
Observations  
Interviews

## *Summative*

Assessing  
"How did we do?"  
Observations  
Interviews  
Survey research



## **Sharing Time:**

What is a topic you have an interest in researching?

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# *5 Steps for an Effective Evaluation Study*

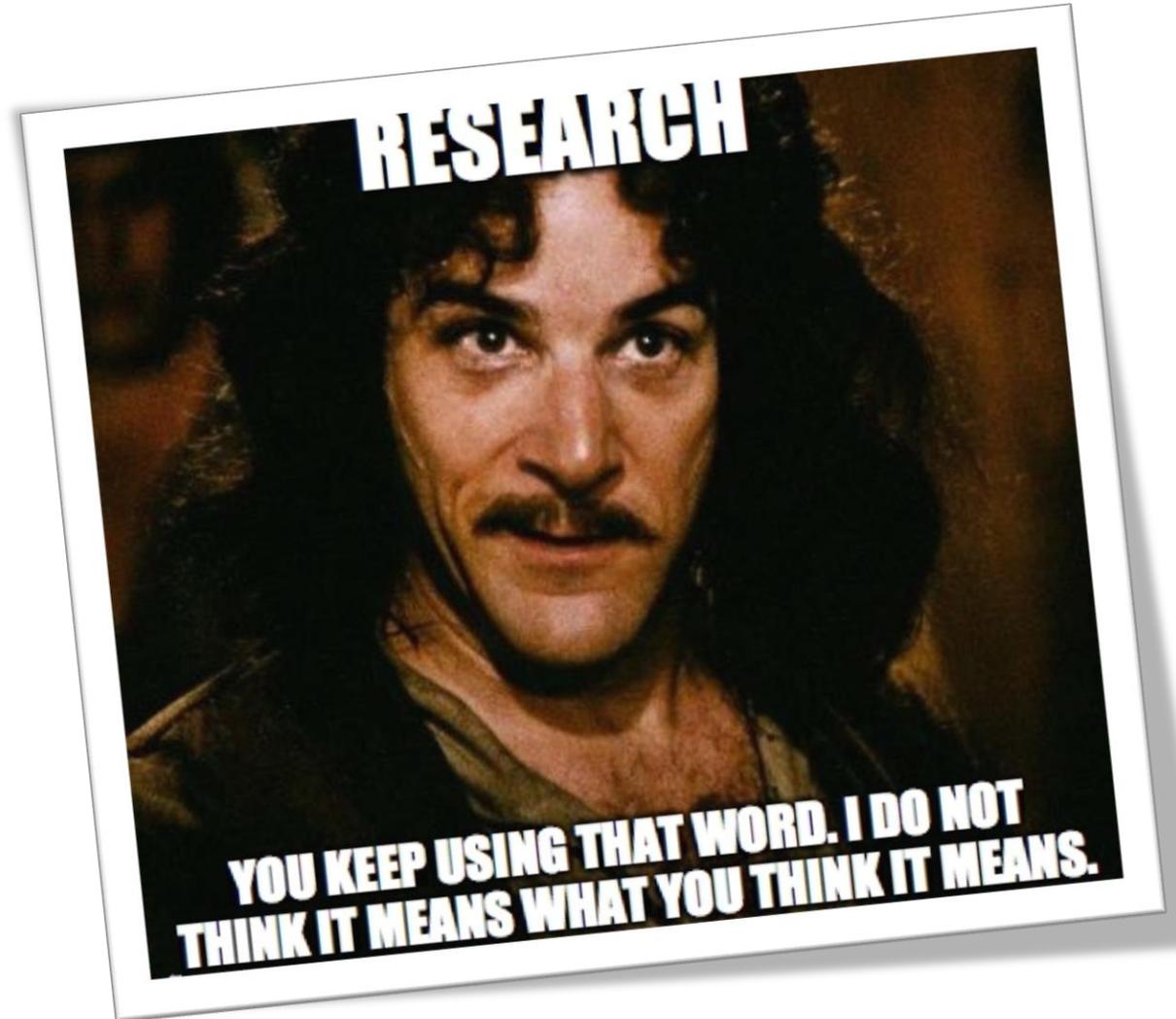
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- 1. Identify the research problem**
  - 2. Determine methodology**
  - 3. Collect data**
  - 4. Analyze**
  - 5. Communicate findings**
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# Identifying Your Research Questions

Research questions should be:

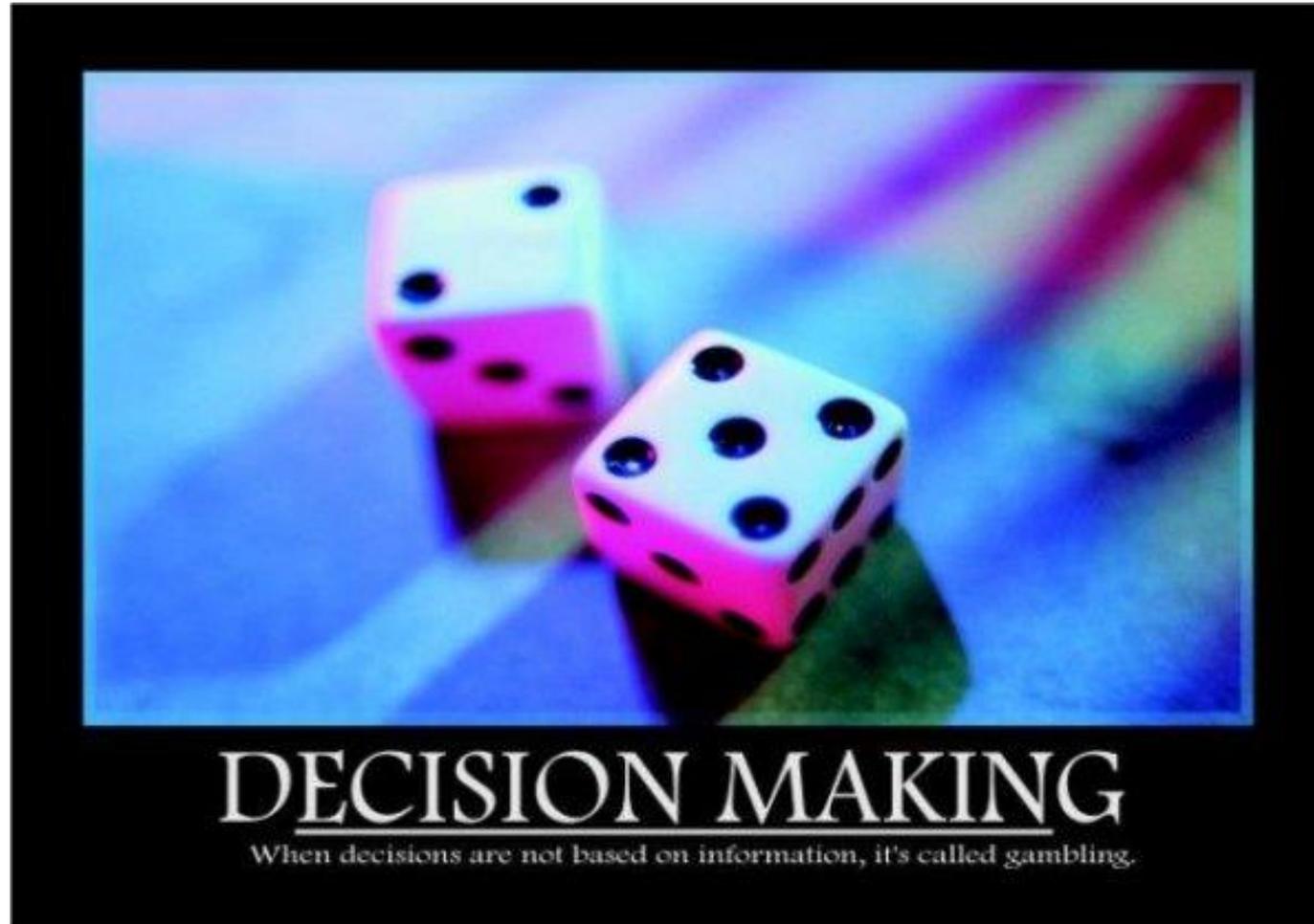
- Actionable
  - Achievable within the study parameters (time, resources, ability)
  - Set the scope of the study
- 



# Developing Research Questions/Goals

- Interview the key stakeholders in the project: What do they want to know?  
More importantly: What do they need to know?
  - Balance making the study relevant to different stakeholders within the parameters and restrictions of the study itself (time, \$\$\$, ability)
  - Limit each study to no more than 3 guiding questions or objectives
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# Determining the Right Methodology

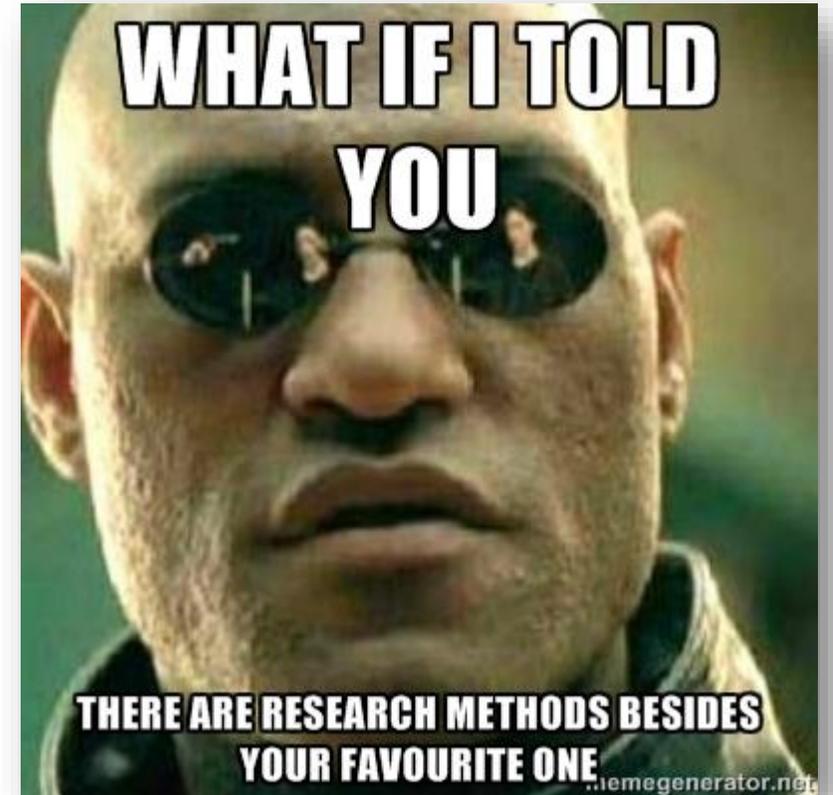


# Why Quantitative?

1. Responses to specific queries to help understand the state of something (How many, how much, what factors predict X, is the number of something changing over time, how do we compare with X?)
  2. Larger sample sizes are helpful when trying to determine trends that can be applied to a population (visitors, members, non-visitors, etc.)
  3. Allows for statistical analysis into answering **what**, the factors that influence it, how one group varies from another, and potentially, how to predict a future effect
  4. Closed-ended nature means you will get responses to the key items you seek
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# Quantitative Methods

- Surveys (entrance, exit, and everything in between)
- Timing and tracking/observations/visitor mapping
- Online metrics tracking
- Data benchmarking and modeling



# Why Qualitative?

1. More exploratory and participant-led, discussions can also build upon each other in a sequence
  2. Open-ended nature helps uncover responses you may not have previously anticipated or covered through a survey.
  3. Allows for respondents to uncued
  4. Sometimes can get to more of the heart of the matter and emotional connections
  5. Smaller sample sizes
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# Qualitative Methods

- Focus groups
  - Interviews
  - Observations/field notes
  - Mystery shopping
  - Ethnography
- 



# Mixed Methods

Sometimes the best approach is using aspects of both methodologies in conjunction with each other:

- Surveys with open-ended response fields
- Survey in combination with an interview
- Focus group with rating document

“Studies show that we are wired to remember stories much more than data, facts and figures. However, when data and story are used together, audiences are moved both emotionally and intellectually.”



# Before You Begin: Identifying Target Audience(s)

- Whenever possible, research and evaluation should be completed with the target audience of the project/program/product.
  - Remember: If the target audience is under 18, additional ethical obligations must be considered.
    - Minor children are considered a protected research class.
    - Recommend the free Association of Clinical Research Professionals (ACRP) ethical research class at <https://acrpnet.org/courses/ethics-human-subject-protection/> for additional information
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**GET ALL THE  
DATA!!!**



memegenerator.net

# Ask Yourself: Logistical Questions

- How much time do I have?
  - How much budget do I have?
  - What other resources are at my disposal (people, automation, etc.)?
  - Where will I conduct my research (on-site, off-site, and/or online)?
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# Planning for Data Collection

1. Build in plenty of time to collect and enter your data.
    - Think about busy and slow times at your museum and bear those in mind as you develop your schedule.
    - Enter your data in as you go to monitor for any issues
  2. Draft your qualitative instrument. If possible, pre-test the questions with other staff members, family/friends, or patrons.
  3. Incentivize if possible. If no budget, consider: What is lurking in your storage areas that patrons might value?
  4. Train your data collectors in your practices and rules.
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# Setting Your Data Collection Rules

1. Ethical obligations: If you are focused on children or another protected class, additional consent regulations apply
  2. Library rules: Is there an Internal Review Board (IRB) that needs to be consulted before social science research is completed?
  3. Determine an end point: What will constitute “the end”?
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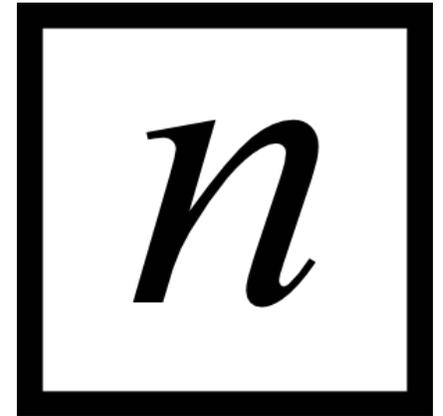
# Sample Sizes: When Enough is Enough

Consider...

1. *"How important it is for your results to generalize beyond your study."*
2. *"The size and variability of the population of interest."*
3. *"The smallest subgroup within the population for which estimates are needed."*

– Judy Diamond, Michael Horn, and David H. Uttal, *Practical Evaluation Guide*, 3<sup>rd</sup> Edition (2016)

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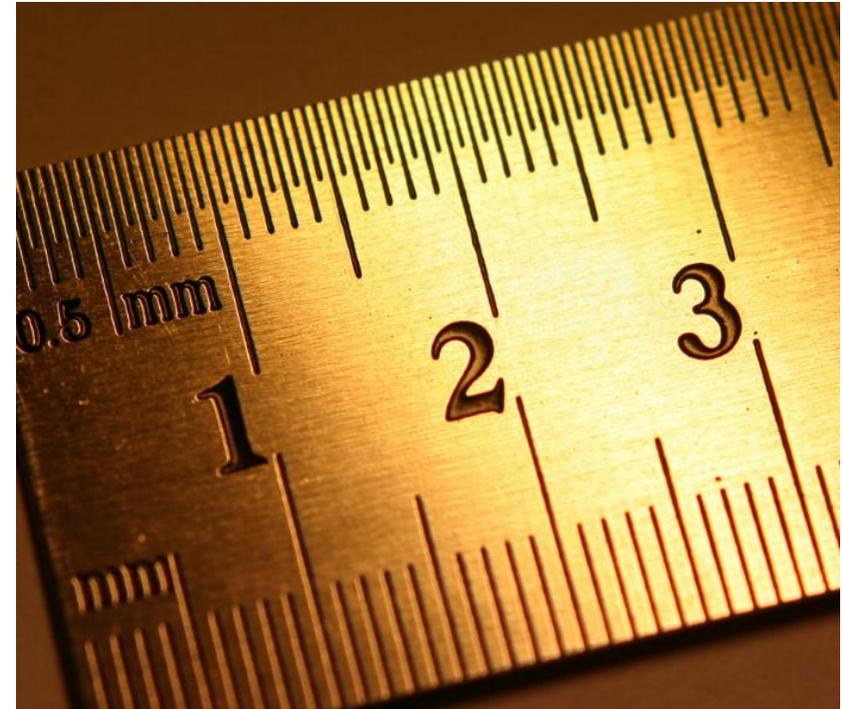


# Sampling Patrons: Two Approaches

- Self-selecting
    - PRO: Easy to set up and requires less direct staff data collection
    - CON: Tend to only get the positive and negative sides of the story, not the middle; not necessarily a representative sample
  - Systemized random sampling
    - PRO: Ensures a more representative sample of patrons and better data for large-scale studies
    - CON: More time and effort involved for staff; need to be mindful of evaluator biases
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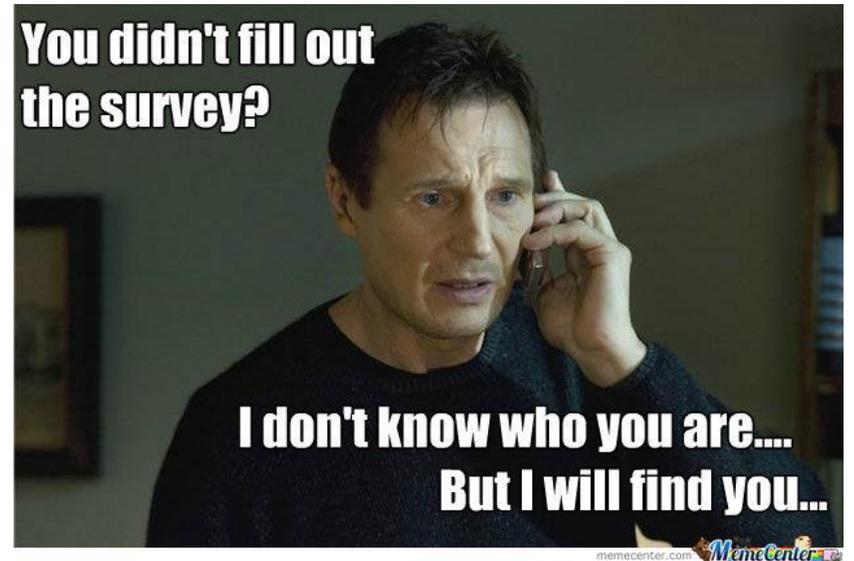
# For Random Sampling: CMA's Golden Rule of "3"

1. Pick a spot on the floor close to your data collection post.
2. Ask every **third** person/group who walks through that spot to participate in the study.



# Intercepting Patrons

- Develop an ask that feels authentic and personalized to you.
- Be positive, yet neutral. Smile!
- Keep it low pressure.
- If they don't want to participate, simply thank, wish them a good day, and move on to the next.



# Asking Questions

*"Qualitative methods...emphasize the depth of understanding over how well they can be generalized to larger populations...They are also effective as a way of describing complex or unpredictable phenomena that cannot be easily summarized into discrete categories."*

-Judy Diamond, Michael Horn, and David H. Uttal, *Practical Evaluation Guide, 3<sup>rd</sup> Edition* (2016)

- Improvisation
  - Taking the scenic route
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# Asking Questions

## Designing your interview guide

- Decision time: Which of the following feels better to you?
    - Working from a predefined script of questions with minimal probing
    - Having a few general questions and instead using more probing techniques to delve into participant answers
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# Asking Questions

## General guidelines for your interview guide

Start with a broad, easy question to reduce participant anxiety and foster trust.

Consider the flow of the main questions:

- Keep like with like
- Build bridges
- Put most important questions first
- Be mindful of biasing

Finish conversation with asking them if there's anything else they want to share.



# Asking Questions

## Gathering qualitative data

There are many ways to approach qualitative inquiry and plenty of room for flexibility and creativity.

- Most qualitative questions start in the form of “How” or “What” (“How does this make you feel?” “What is going on here”)
- Ask open-ended questions (stay away from “Yes” or “No” responses)
- Avoid leading questions (“You loved the program, right?”)
- Don’t be judgmental (“Tell us why you didn’t like it!?!?!?”)





*Time to play*



# Create Your Own Interview Questions!

Think of at least 3 questions you'd like to ask your patrons or stakeholders and try to formulate it in a way that you could ask it through an interview.

When you're done, please share one of your questions in the chat!

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# Interviewing Do's

- Embody neutrality.
  - Live their truth.
  - Resist the urge to correct or answer questions. Instead ask them how they feel about something or what they would like to see.
  - Focus on listening, not yourself or writing.
  - Be comfortable and relaxed, it will encourage them to do the same.
- 



# Interviewing Do Not's

- Forget to watch your body language and words, potentially leading participants towards certain verbiage and answers.
  - Not using exact words from the participant when writing down notes.
  - Start recording without getting permission
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# Applying Interviewing Techniques to Larger Groups

- Same general approach, only now you're applying it to multiple people at the same time
  - Focus groups: You are the host, boss, confidant, diplomat, and authoritarian ruler (all at the same time)
    - Moderators must be able to manage the group and hear from everyone
    - Be mindful of group dynamics and group think
    - Typically 1-2 hours in duration
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# Time to Practice!

Meet with your partner and bring the 3 questions you developed earlier. Practice using the questions you developed earlier and switch after 5 minutes.

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# Roundtable

What worked well?

What was difficult?

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# Understanding Your Findings

## Analyzing qualitative data

*"The goal of qualitative data analysis is to uncover emerging themes, patterns, concepts, insights, and understandings"- (Patton, 2002)*

In their book, *Qualitative Data Analysis: A Methods Sourcebook, 3<sup>rd</sup> Edition*, Miles, Huberman, and Saldaña (2013) offer a straightforward series of steps for dealing with analysis:

1. Reduce
  2. Visualize
  3. Draw conclusions and verify
-

# Analyzing Qualitative Data

## Reduce

“Data reduction is the process of selecting, focusing, simplifying, abstracting, and transforming the data”

- Identify relevant patterns to questions and issues
- What is important?
- What story is the data telling?

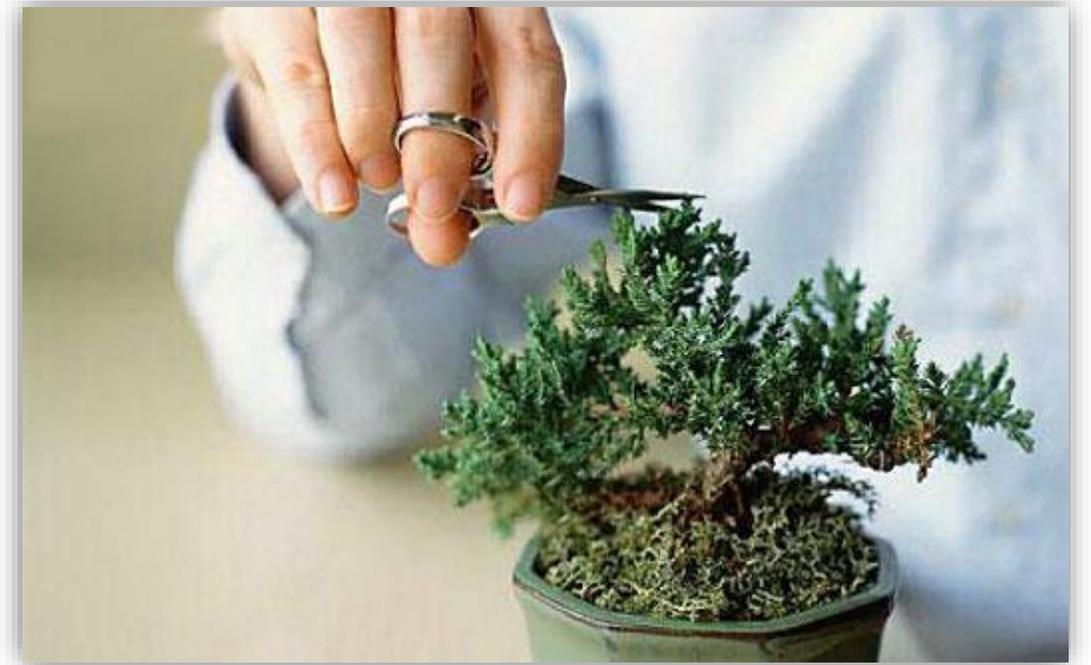


# Analyzing Qualitative Data

## Reduce

Data collection and analysis often occur simultaneously

- **Tend to your data as it grows.**
- Constantly “prune” your data to only the comments that are relevant to the answers you seek. This pruning process allows your data to continue to grow, but in a *focused* way.



# Analyzing Qualitative Data

## Reduce

- Transcribing and Notetaking
  - Coding
    - Deductive Codes: Created from research questions prior to data collection
    - Inductive Codes – emerge from existing data; dependent on context
  - Reliability
- 



# Analyzing Qualitative Data

## Visualize

*"People perceive information in different ways. And there's some research that suggests that reading is not natural or innate, but visually processing information is something that people can innately do. So if we can bring the more visual medium to text data, I think it adds to it. I think the other real strength of visualizing qualitative data is it adds that wide-angle view and allows you to see the forest a little bit more."*

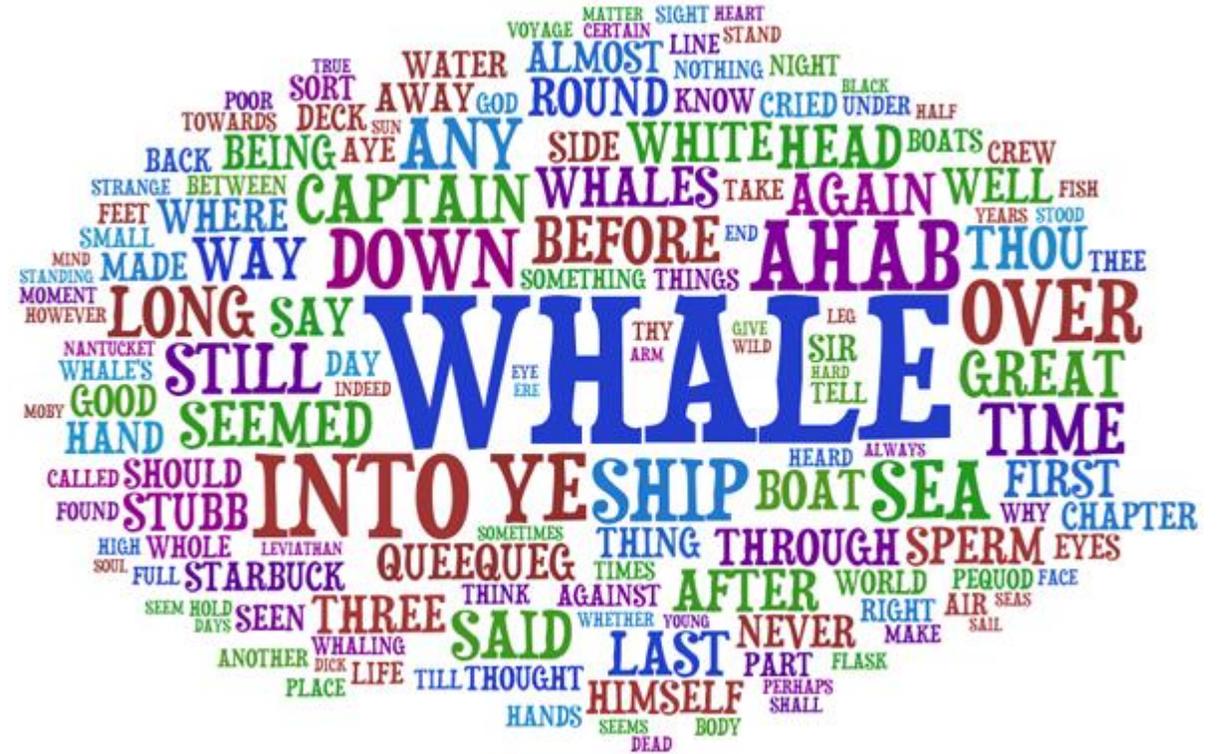


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Quote: Dr. Stuart Henderson, Associate Director for the Schools of Health  
Research Education Outcomes Evaluation Unit at the University of California, Davis

# Analyzing Qualitative Data

## Visualize



# Analyzing Qualitative Data

## Draw conclusions and verify

*Have I captured the essence of the event? What didn't I hear?*

*"If description [quantitative] answers the question, 'What happened?' interpretation [qualitative] can answer the question, 'Why?' [...] this sort of interpretation cannot happen without some intellectual courage on the part of the ethnographer; he must take his summary and say, 'This is what this means!'"*

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Quote: Sam Ladner, *Practical Ethnography: A Guide to Doing Ethnography in the Private Sector*, (153-154) 2014.

# Starting Your Report: Ask These Key Questions

- Who are the key stakeholders who need to know these findings?
  - What's my organizational culture?
  - Does my library have a culture of evaluation?
  - How much time do I have before the data is needed?
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# How Do You Manage and Summarize Qualitative Data?

Paraphrase when possible

- Direct quotes can be incredibly helpful, but are not always necessary

Illustrate your findings with metaphors

- “What is X?” (*Doing Anthropology in Consumer Research*, Denny and Sutherland, 2007)

What *is* coffee?

- A hot caffeinated beverage?
- *OR* a way to bond with a friend?



# Things to Watch Out For in Qualitative Reporting

- Resist the urge to say “50%” or make your qualitative data quantitative (unless you are analyzing codes). Use more imprecise measures (i.e. “most” or “a few”).
  - Know your own limits and biases.
  - Use the strengths of qualitative research – the in-depth findings on motivations at the heart of the issue – to work for you rather than against you.
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# Not Every Project Needs a Formal Report!

- Formative testing is often quick and iterative. Maybe you just need a debrief meeting with a bullet point summary.
  - Depending on your organizational structure, perhaps a slide deck and/or infographic might be more likely to be looked at than a multi-page report.
  - Document your findings and methodologies some way on every project, especially when just beginning so you can grow and learn from your experiences.
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# Questions?

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***Thank you!***

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