

POWER TO OUR PEOPLE

PARTICIPATORY RESEARCH KIT:

CONDUCTING INTERVIEWS

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DataCenter
RESEARCH FOR JUSTICE

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Power to the People








Participatory Research Kit: Recording Interviews

Introduction








This toolkit provides an overview of an interview project. It focuses on **participatory research**, research done for and by individuals in the community. The community is able to express the issues that are important in their *own* lives, instead of outsiders determining issues on their behalf. Interviews by community members are a valuable method for obtaining this information. They allow us to document what is going on in our community, learn more about ourselves, and give a voice to individuals who are often denied presence and visibility in our society.

We are the experts of our community. By conducting interviews, we honor day-to-day reality as knowledge, without allowing institutions to determine its validity. We deconstruct what is understood to be information and who is understood to be its owner. This toolkit describes methods of packaging community-rooted information into a tool for creating change.

Reasons to do interview-based research

-  can obtain more extensive and in-depth information than other methods
-  honor day-to-day reality or lived experience as knowledge
-  learn from community members and record community history
-  low costs of tools-- tape recorder is all you need!
-  build a campaign on information you created
-  transform verbal information into written and analyzed data
-  learn information interviewee regards as important, which you did not previously consider

Challenges of interview-based research

-  don't yield quantitative information (i.e. % of respondents who feel a certain way)
-  can't collect information from as many people as other methods
-  limited by interviewee's memory
-  time-intensive process of typing interviews and analyzing large amounts of text
-  reluctance or refusal of community members to be recorded
-  dependency on interviewee to agree to meeting times
-  motives or biases of interviewee's must be kept in mind (as is true with all forms of information gathering)

Project Planning



What campaigns or organizational goals will the interview project support? What is your primary question – the question that will guide all the inquiries?

Break down what the campaign is, who its targets are, and what information is needed. List your goals and reasons for doing the interviews. How will community knowledge be used to build your campaign or support your work? Keeping in mind the goals of your project, figure out the question that is at the center of your project.

What information do you already have?

What background information has already been collected? Consider researching on the Internet, at the public library, or submitting a public records request with a governmental agency. Knowing what information is already public knowledge is helpful in figuring out what *new* information or viewpoints you need and what questions to ask. Or what's the frame of the information out there? Is the information portraying your community negatively so you need to counter with your story?

What information are you looking for?

List key points you think community members have to share that would add to or sharpen the information you have already obtained. Consider bringing community members to brainstorm issues (and share the results from the background information you gathered)



Who holds this information and how will you identify them?

When determining whom to interview, ask yourself who is being impacted by your research. Further criteria for selecting interviewees and organizations may be demographics, location, first-hand experience, and/or diversity of experience. Consider having interviewees involved in other aspects of the project including analysis and release

How many community/organizational leaders will you interview?

Consider how much time is available to do the interviewing and transcribing (Keep in mind that it takes transcribers four to six hours to do just one hour of tape). Depending on your audience

and your resources, how many can vary. A modest number can be 10-15 whereas for a wider audience, you may need at least 25.

Who is your audience and how will you release your research to them?

List targets and groups the research may be useful for. Possible methods of releasing the information include publishing the findings, radio programming, and creating a factsheet or website with data and testimonials. It is important to keep your audience in mind as you plan the interviews so that you can make sure to gather information that is of interest to them and communicate through your chosen mode of delivery. Consider bringing back your interviewees and sharing the information with them.

What is the timeline of the project?

Create a timeline that addresses the following: preliminary research, locating interviewees, conducting interviews, transcribing the interviews, analyzing the transcripts, and formulating the finalized product of your project. Formulate rough deadlines to keep yourself on track.



Who will conduct the interviews and who will train the interviewers?

If there is more than one interviewer, make sure they are trained to conduct the interviews in the same way (with plenty of role playing) and that they communicate with each other on the interview guide and how it is working. Be aware of and minimize **interviewer bias** — interviewees may respond differently to different interviewers based upon differences in interview style, age, race, class, gender, or culture. Less interviewers are better because over time, they become more comfortable with the interview questions and the project.

What language will interviews be conducted in?

Is interpretation needed during the interview? Is translation of the transcripts needed afterwards? If an interpreter or translator is used, who will it be and how will they be contacted?

What tools or equipment will you need?

You will need tape, video, or digital recorders to record the interviews. A computer is needed transcribe the interviews. There are also specialized tape players with foot pedals for transcribing, which speed up the process. Data analysis software is very helpful when analyzing the transcripts.



Who will transcribe the interviews?

As mentioned above, transcribing considerable time which can vary depending on the experience, the content and the tools available.

What other resources (money, staff, etc.) will be needed?

Take the timeline into account and make sure the workload is manageable to those involved in the project. If not, you may need to consider extending the timeline, buying software to speed up the process, or hiring more interviewers/transcribers.

How will you address safety and confidentiality concerns?

Take a look at the confidentiality handout (**Appendix 5**) and discuss which options make sense for your interview project.

How will the data be analyzed?

Read the Analytic Theories section (page 12) of the toolkit for a brief overview of some analytic methods. Will you enlist outside researchers to analyze the transcripts? Will they need data analysis software? We have included some free data analysis programs in the Resources section (page 17).

Who will write the report or create dissemination materials?

The final materials can include a summary of all the stories, individual stories on their own, and/or key quotes. You may also include external data or other forms of research. Because you have voices, you can consider editing and submitting to radio stations or putting them up on the website (be sure you have permission to do this from your interviewees)

There is a Project Planning worksheet in **Appendix 2** for you to fill out. Answering these questions on a piece of paper will help you formulate the logistics of your project.

Planning and Conducting the Interviews

1) Arrange the interviews

Once you have a list of people you'll be interviewing, get in contact and set up a time to meet. Ideally you should arrange to meet for at least 2 hours. The interview may end earlier, but you don't want the conversation to get cut off.



For an example of strategies in scheduling and organizing interviews see **Interview Scheduling Matrix Worksheet (Appendix 3)**. An **Interview Schedule List** is also available in **Appendix 4**.

Phone interviews – a last resort

Interviews can happen in person or over the phone depending on the interviewee's availability and location. We recommend that all interviews are carried out face-to-face because they allow for more depth than phone interviews. However, sometimes phone interviews are the only option. If you must conduct interviews by phone, we have included several links to free telephone recording software in the Resources section.



2) *Create an interview guide*

An interview guide is a set of questions or thematic areas you plan to cover during the interview. Interviews are not rigid like surveys where you are expected to read each question and answer in a specific order. Rather, an interview guide is designed to guide you through process. What you want to do is create an authentic conversation, referring to the interview guide to direct the conversation and make sure that certain content is covered during the interview. It also creates uniformity when you interview multiple people.

Using your primary question, you will come up with an interview guide that outlines the questions or topics you want addressed in the interview. The guide can range from as simple as a brief checklist of topics to as detailed as one with all the main questions written out, including possible probe questions.

Interview guide tips

- ❑ Have the questions be open-ended. If the person can answer yes or no, they may. However, if you use words like “describe” and ask “how” something occurred, they will need to go into detail.
- ❑ Turn “why” questions into “how” questions: “why” questions often lead to justifications; “how” questions tend to tell you something about the process
- ❑ Put the interviewee at ease by formulating transitions to make the questions flow together smoothly.
- ❑ Put in “probes” for yourself. These are areas where you want to stop and elicit further depth. They can be “who, what, where, when, and why” questions or questions to prompt elaboration or clarify confusing concepts.



- ❑ Group the questions together and prioritize.
- ❑ Keep it short. You don't want a guide that is more than a page or page and half. It should really be a guide to the topics you want covered, a type of outline.
- ❑ Pilot it! After you've created it, try it to make sure it works in the way you planned it and that it is getting you good answers.

Questions to avoid

The following question types are likely to generate self-fulfilling or superficial responses and should be avoided:



- ✗ **Leading questions** are ones that “lead” interviews to a certain response. Instead of responding with their true opinions, interviewees may tailor their responses to conform to what they perceive to be a good answer from you.
 - “Don't you think that toxic waste sites contribute to long-term health problems, such as cancer and asthma?”
- ✗ Questions that contain **loaded words** should be avoided. Loaded words are those that carry negative connotations for some people, regardless of the statement made. Like leading questions, they may signal to interviewees a certain response.
 - “What do you think of government restrictions on corporations?”
- ✗ **Closed questions** don't encourage interviewees to provide detail or depth in their answers.
 - “Do you think clean-up of toxic waste sites has been avoided by the authorities?”
- ✗ Questions can be confusing when they are long and contain **multiple elements**. When questions are comprised of multiple elements, interviewees don't know which to address.
 - “How has clean-up of toxic waste sites been advocated for by the neighborhood people, have authorities listened to or suppressed them, and what are they doing to respond to them?”

3) Conduct the interviews

Leading up to the interview

Before you begin meeting with interviewees, find a quiet, comfortable place to meet. Make sure it's a place where others won't overhear or listen to the conversation. **Test your recording equipment** and make sure the sound is clear. Review the interview questions to make sure they make sense and you are comfortable asking for this information. You may want to practice on a friend



or co-worker.

At the start of the interview

If you haven't already done so, introduce yourself and your project to your interviewee. Explain who you are with, the objectives of the project, and why this is important in the short term and big picture. Give them any materials about your project or organization (if they aren't already a member). Explain options for confidentiality and anonymity, ask them to sign the consent form, and ensure them they can stop anytime. Allow the interviewee to ask any questions he/she might have (see "Questions for You" section for examples on page 10). Avoid discussing outcomes you expect to find, as this may bias the interviewee towards expected responses.

After this introduction, begin recording, double-checking that the equipment is running smoothly. Start the tape by saying your name, the full name of the interviewee, and the date (including year) and location of the interview.

During the Interview

Refer to the interview guide, but you don't need to follow it strictly. Instead, you should focus mainly on the rapport between you and your interviewee, referring to the guide as a backbone to keep you on track. Observe while interviewing, being aware of and sensitive to how the person responds to different questions. Begin with questions that are easier to answer and slowly build into the more sensitive ones after the interviewee is more comfortable.



Your interviewees aren't all the same; thus, there will be differences among your interviews. Some people may have more or less to say on certain questions. If a question doesn't seem relevant to them, it is okay to move on. There is usually some overlap between the questions. If the question has already been answered in response to a previous question, you don't need to ask it again, but you may want to check in to see if the interviewee has anything else to add on the point. Keep the tape recorder running, even if you think the information is irrelevant. It's better to waste a little tape than miss a good story or draw too much attention to the recording device. Try to keep the interviewee on subject, however; you do have to transcribe everything they say.

Keep questions clear and create a comfortable environment for the interviewee, always respecting his/her wishes. Be aware of your language and words the interviewee may not be familiar with. Take your cues from the storyteller – use their wording. Ask one question at a time and avoid interrupting the interviewee. Really listen and be affirmative to the answers by nodding and encouraging. Try not to gesture or make sharp movements while listening to the

story; it may distract the interviewee or create discomfort. Allow for silences; they give the speaker a chance to think. If you feel yourself rushing on to the next question, use periods of silence to review your interview guide or write down brief notes. Take breaks as necessary.

Do not state your opinion, agree, or disagree with anything that is said. Your role is simply an observer and you should not have any influence over the interviewee's responses. Be aware of and maintain neutral body language. Be culturally sensitive – don't be judgmental if something feels strange or surprising to you.

If for some reason you can't record the interview, it is still very important to get an accurate account of the interview. Take notes that capture the main points of discussion. If necessary, ask the interviewee to slow down or repeat key points to make sure they are recorded. If the interview is over the phone, it is sometimes easier to type while the interview is taking place. If the interview is face-to-face, taking hand-written notes may be necessary.

After the Interview

Double check that the interviewee is comfortable with everything said being on record. Ask the interviewee if there is anything else they would like to add and thank them again for their time. Ask if they have any questions for you and if would like to stay in touch with you regarding the results. After the interview is completed, say "Time Ended" or "End of Interview" so that when you come back to the interviews later, you'll know nothing got cut off. Label the tape with the date, interviewee's name, or a code.



After an interview, do not simply move on to the next one. You should listen to the tape, examine your interviewing strengths and weaknesses, and determine what you can improve on for the next interview. Following are some questions you should ask yourself after listening to the tape: (taken from H. Rubin and I. Rubin's Qualitative Interviewing p. 164-167):

- ❑ Did you approach personal and difficult questions too quickly, rather than building towards them to make the interviewee more comfortable?
- ❑ Were the interviewee's answers of sufficient depth? If not, try to determine why.
- ❑ Did you use enough probes and ask enough follow-up questions? If not, try to come up with more.
- ❑ Were you able to keep a neutral stance, or did you inadvertently express some of your own opinions in the interview, possibly influencing the interviewee's responses?
- ❑ Think about what the interviewee may be saying indirectly and develop follow-up questions to make the interviewee address these subjects directly.

- ❑ Did your interviewee bring up themes that you did not previously consider, but would be helpful to include in your research? Revise your interview guide to include questions on these themes.

Questions for you

Interviewees will most likely have questions for you too! Here are some things that might come up and some ideas for how to address them.

What is the purpose for the interviews?

List your project's goals and objectives. Explain past research done on the subject and why this research project is taking place.



What is the extent of my involvement in the process? How can I stay involved? Can I become an interviewer myself?

Tell them you can contact them regarding the results of the project. If it is a report, tell them you can send them a copy. Ask if they would like to volunteer to transcribe or code the interviews or become interviewers. More interviews allow for deeper research, but make sure you have the resources. You can also include interviewees in analysis and dissemination.

What is this information going to be used for? What are expected outcomes?

Explain what form (report, factsheet, etc.) the information will take and how the interview data will work into the final product. Don't talk about expected outcomes before the interview, but if you want to speak generally after the interview, feel free to do so.

How do you handle confidentiality? Can my name be protected?

Go through how confidentiality will be ensured. See **Appendix 5** for confidentiality and safety options.

4) Transcription

Once all the interviews have taken place and been recorded, they are ready to be transcribed, or typed into a written format. This process is extremely time-intensive. An experienced transcriber takes **four to six hours** to transcribe one hour of tape! More experienced transcribers can be quicker.



Plan ahead!

If possible, budget in paid transcribers. If you are using volunteer transcribers, make sure to start early. Set up a transcribing timeline and figure out if

equipment is needed.

NOTE: Transcribing is a great time to involve community members or volunteers, but make sure transcribers are aware that interview information is confidential.

Transcription toolbox:

- ❑ Tapes and Tape Recorder
- ❑ Foot pedal (available at electronics stores such as Radio Shack)
- ❑ Access to word processing (and printer for coding)

If resources are available, foot pedals and transcribing machines really speed up the process!

Transcription guidelines¹

If more than one person is transcribing, make sure everyone is following the same format, content, and editing guidelines.



<u>Format</u>	<u>Editing</u>	<u>Content</u>
Use double-space.	Break up long sentences.	Where a word or a phrase is inaudible, type ().
Use the whole name the first time the speaker appears; use initials each time after.	Repeated phrases or words such as, "you know," "um," or "like" can be left out. (you may keep these in if you plan to use transcripts to produce audio clips)	When there is an interruption, use dashes. For example: There was a—.
Skip a line when the speaker changes.	Leave out interviewer responses when they are only showing that they are listening (such as, "wow," "that's interesting," etc.).	Use brackets for outside noises [sirens], expressions of emotion [laughs], or long pauses.
Indicate the beginning of a new side of tape by starting a new page and typing "START OF TAPE 1, SIDE B" (or whatever is appropriate). Indicate the end of the side of a tape by typing "END OF TAPE 1, SIDE B." Write "END OF INTERVIEW" when all tapes are finished.	If the transcriber is not closely connected to the project, check over the transcripts for names or places they may have gotten wrong.	

¹ The SOHP Practical Guide. http://www.sohp.org/site_images/csas/practical_guide_%28Apr-2009%29.pdf

5) Data analysis

When analyzing the interview transcripts, you are transforming your raw data into findings or results that can fit into a new or existing theory about a broader condition.



Analytic theories

There are different methods used to analyze data, often depending upon what kind of research is being done and how much previous research exists. Most of the research in the “hard” sciences consists of deductive analysis. Deductive analysis begins with the formulation of a hypothesis (which is derived from an existing theory), after which data is collected in a manner that corresponds with the theory, to confirm or falsify the hypothesis.

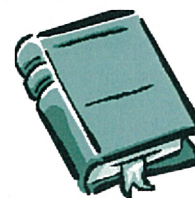
Inductive analysis, on the other hand, is prevalent in qualitative research. **Analytic induction** begins with a rough hypothesis, which is continuously reformulated through research of negative cases – ones that contradict the hypothesis. When encountering a negative case, the hypothesis is either modified to include the case or the phenomenon is redefined to exclude the case. The result of analytic induction is one specific, all-inclusive hypothesis that establishes a relationship between the phenomenon and all explanatory factors.



Grounded theory utilizes an inductive method in that the analysis begins with the data itself, and thus emerges from the ground up. Rather than beginning with a hypothesis, the first step of research is data collection. From the data collected, key points are labeled with codes and grouped into similar concepts or themes, which are then used to generate a theory on the subject. Grounded theory is useful in interview research because it allows the

interests of the interviewee to guide the focus of the research, instead of simply following the focus of an existing theory. It is broader than analytic induction in that it seeks to produce multiple hypotheses, of which it requires only a general fit of cases. Grounded theory is primarily desirable in theoretical discovery, when there isn't already a relevant, existing theory.

Theoretical extension and refinement, however, are also important focuses of qualitative research. In theoretical extension, existing theories are extended to groups or situations of which they were not previously considered. It is aimed at transferring concepts and theory across diverse contexts. Deductive analysis is often the method of choice for theoretical extension because it is directed towards expanding an existing theory.



Theoretical refinement refers to the modification of a theory through analysis of new data. Because it draws upon an existing theory, yet also attempts to improve or refute it, theoretical refinement draws upon both inductive and deductive analytic methods. The researcher should be familiar with relevant theories, but not let the existing theories frame the research so that they are the only basis of the topics focused on in the data. One should allow oneself to be guided by the data itself as much as the theories, so that they mutually enlighten each other.

Coding

After the interviews are transcribed, you may begin coding them. Coding is the process of grouping together interview responses that have similar concepts or themes of interest. Once the themes are grouped together, it is easier to discover variations, nuances, and connections within and between themes. Simply put, coding encourages you to find meaning in the data. The following lays out how to code without using software. Doing it this way helps in understanding the coding process. But this process can also be done by creating cutting and pasting word documents and creating worksheets in excel.

The 10 steps of coding

1) Prepare the texts.

- a. In each transcript, break and number paragraphs. Each transcript should have a letter assigned to it, and each paragraph within the transcript should have that letter and the number of the paragraph.
- b. Make multiple copies (preferably, each transcript should be on different color paper) of each transcript.

2) Identify themes in the transcripts.

- a. Read a few transcripts and start pulling out what themes are showing up. This will be your code. By the end of this process, your codes should be permanent and apply to all future transcripts.



3) Once you've assigned codes, create a codebook that should have the following:

- a. Name of the code.
- b. A brief description of the code.
- c. An example of the code.
- d. If possible, you can group your codes (those that have common themes) and place them under one heading.



4) Go through remaining transcripts and apply the codes.

- a. If you find that you need to create a new code, you may, but then you must read through all previous transcripts to see if the code applies.

- b. Tips to coding include:
 - i. Compare when you are coding new text to the way you coded previously. Is it similar enough?
 - ii. Keep notes. For example, this code applies to this text because...
 - iii. Look for words that repeat, ideas/content that are missing (that you expected to see), and metaphors or analogies.
 - iv. If you have headings within a code, you can indicate which heading the paragraph belongs to as you code.

5) Write the name of each code on a separate piece of butcher paper.



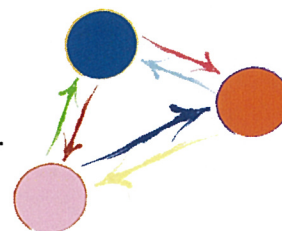
6) Go through the transcripts, cut out the texts, and place them on the butcher paper. If a text has multiple codes, then use the additional copies of the transcript.

7) Once all the transcripts have been cut and placed on butcher paper, take any one of the codes and review what shows up under that code.

- a. If you've used colored paper, you should be able to identify what interview it comes from.
- b. All paragraphs should have been labeled with a letter and number (see Step 1).

8) Start looking for common threads and themes.

- a. Pull out common themes, threads, and differences.
- b. Make notes on the butcher paper about what you're seeing.
- c. Pull out powerful quotes that speak to the themes.



9) Summarize the analysis.

- a. Analyze how the different themes relate to each other.
- b. Determine the theoretical or policy implications of your research.

10) Create reports or factsheets that contribute to campaign or organizational goals.

- a. Keep the audience in mind when writing your report. Think about their knowledge of the subject matter and areas of interest.
- b. Describe the world of your interviewees accurately and convincingly. Using quotations can help.
- c. Once you have a draft of your report, give it to those involved in your project and ask for comments. After all the time you have spent on the project, it may be too difficult to objectively review it.



There are computer programs that can help with the analysis of interview transcripts. You can use the programs to perform many tasks, such as coding, writing personal comments on the interviews, doing word counts, and searching for keywords. They are much faster

than manually coding data, and can save hours of work. While these programs can help you organize the data more efficiently, they are not substitutes for your analysis of the data. There are some links to free data analysis software in the Resources section.

Case study

Winnemem Wintu: Protecting Sacred Sites Through Storytelling and Advocacy

DataCenter intern, Michael Preston, undertook a project to interview 15 members of the Winnemem Wintu tribe. The goal of the project was to collect direct quotes and information from community members about how the proposed raising of the Shasta Dam would affect sacred sites. Interviewees were asked what sacred sites were, how they were used, and how federal tribal recognition would change the Winnemem Wintu's ability to protect these sites from destruction—or in this case, flooding. Because the Winnemem Wintu are not a federally recognized tribe, they do not own the land where their sacred sites are located. If the Shasta Dam were raised, many sacred sites would be flooded and become no longer accessible for Winnemem Wintu ceremony and spiritual use.

The main purpose of this interview project was to create a pamphlet or report to target local politicians. Through coding the interviews and creating a written analysis of the community knowledge gathered, the project put this information into a format that politicians would respect and consider valid. Beyond this objective, the project sought to educate people about injustices the Winnemem Wintu have faced in the past and continue to struggle against. The interviews speak about Wintu beliefs and how these sacred sites have been used down through the generations.

At the same time that the project's materials are getting the word out to other communities, it serves an important role within the Winnemem Wintu community itself.

As Mike puts it, "The other reason we are doing this is to put our voices on record for the tribe itself to do as we wish with. It helps us put the meaning of sacred sites in words and it will be useful for our future generations to hear what their elders had to say as well. I think it helps the individuals doing the interviews, some more than others, with talking on a public level because they are going on record with what they say knowing that other people are going to be hearing it."

For more information about this project, please contact:
Mike Preston, wintu6472@yahoo.com

Resources

Oral History:

http://dohistory.org/on_your_own/toolkit/oralHistory.html#WHATIS
<http://bancroft.berkeley.edu/ROHO/resources/index.html>
http://www.sohp.org/site_images/csas/practical_guide_%28Apr-2009%29.pdf

Recording Interviews: http://www.soundportraits.org/education/how_to_record/

iPod Recording: <http://www.duke.edu/ddi/pdf/recordinterview.pdf>

Joint interviews: <http://sru.soc.surrey.ac.uk/SRU15.html>

Translation: <http://sru.soc.surrey.ac.uk/SRU31.html>

Transcription: <http://www.loc.gov/vets/transcribe.html>

Coding: http://www.indiana.edu/~educy520/sec5982/week_5/qual_data_analy_ex2.pdf

Data collection and analysis: <http://www.deakin.edu.au/~agoodman/sci101/index.php>

University of Kansas Community Tool Box:

http://ctb.ku.edu/en/tablecontents/sub_section_main_1047.aspx
http://ctb.ku.edu/en/tablecontents/sub_section_main_1370.aspx

University of Wisconsin Cooperative Extension: [Analyzing Quantitative Data.](#)

http://www.healthpolicy.ucla.edu/HealthDATA/tw_cba23.pdf

Free Websites/Software to Record Telephone Interviews:

<http://www.freeconference.com>

<http://www.freeconferencecall.com>

<http://drop.io/> -- (guide for how to use drop.io at <http://theclosetentrepreneur.com/record-a-phone-conversation-on-the-cheap>)

http://www.freedownloadmanager.org/downloads/SoliCall_41467_p/free.htm

Free qualitative data analysis software:

<http://www.pressure.to/qda/>

<http://www.qdap.pitt.edu/cat.htm>

<http://www.softpedia.com/get/Internet/Other-Internet-Related/GmanDA.shtml>

Book that covers many aspects of qualitative interviewing:

Rubin, H. & Rubin, I. (1995). *Qualitative interviewing: The art of hearing data*. Thousand Oaks, CA: Sage Publications.

Book about qualitative analysis:

Lofland, J., Snow, D., Anderson, L., & Lofland, L. (2006). *Analyzing social settings: A guide to qualitative observation and analysis*. Belmont, CA: Wadsworth/Thomson Learning.

Book that contains good sections on qualitative analysis:

Emerson, R. M. (2001). Contemporary field research: Perspectives and formulations. Prospect Heights, Illinois: Waveland Press, Inc.

Appendix 1: Steps in an Interview Project

1. Gather the beginning and fundamental information about your project.
 - Use the **Project Planning Guide** (Appendix 2) to help make sure you have considered all the angles of the project.
2. Find people to interview for your project.
 - You may use the **Interview Scheduling Matrix Worksheet** (Appendix 1) and the **Interview Schedule List** (Appendix 2) to assist you in scheduling the interviews.
3. Create an Interview Guide to outline the questions or topics you want to address in the interviews.
4. Carry out an interview, following the tips in the **What To Do** section of the toolkit.
5. Listen to the interview tape, taking notes on what you can improve upon in the next interview.
6. Go back to step 4.
7. After your last interview is concluded, transcribe the interviews, following the guidelines in the **Transcription** section of the toolkit.
8. Following the steps in the **10 Steps of Coding** section of the toolkit, code and analyze your data.
9. Organize the results into your chosen mode of delivery.

Appendix 2: Interview Project Planning Worksheet

	Make notes below or on separate paper...
What campaign or organizational goals will the interview project support?	
What information do you already have?	
What information are you looking for?	
Who holds this information and what are criteria for selecting interviewees and organizations? (e.g. impacted by the issue, demographics, location, first-hand experience, diversity of experience, etc.)	
Who is your audience of the information?	
How do you want to release the information to reach your audience? (i.e. a report, audio clips, summary of findings, internal summaries)	
What is the primary question – the question that will guide all the inquiries?	
How many community or organizational leaders will you interview?	

How will you find/identify them?	
What is timeline of the project? (interview schedule, time needed to transcribe, etc)	
Who will and should conduct the interviews? (Does this person have the trust of the interviewees? etc.)	
How many interviews will you do? (How many minimum should you do?)	
What tools or equipment do you need?	
What others resources (money, staff etc) will be necessary?	
What language will interviews be conducted in? Is interpretation needed during the interview? Is translation of the transcripts needed afterwards?	
How will you address safety and confidentiality concerns?	
How will your organization keep/archive the interviews and transcripts in a secure way for the long haul? (Do you have a secure server? a locked cabinet? etc.)	

Appendix 3: Interviews Scheduling Matrix

Goal: to complete Minimum _____ Interviews BEFORE _____ (date)

Interviews be prioritized by _____
(i.e. availability, knowledge of topic, age)

<u>Interviews Round 1</u> GOAL # of Interviews: WHO: (i.e. people from which neighborhood, org, etc)	<u>Interview Round 2</u> GOAL # of Interviews: WHO:	<u>Phone Interviews</u> GOAL # of additional interviews: WHO:
Times and Dates 1. 2. 3. 4. 5. 6. 7.	Times and Dates 1. 2. 3. 4. 5. 6. 7.	Times and Dates 1. 2. 3. 4. 5. 6. 7.
Location:	Location:	Location: Call from office or home (need landline to use conference service with recording features)
Folks lined up for this weekend are (list more than 5 for backup): 1. 2. 3. 4. 5. 6. 7.	Folks lined up for this weekend are (list more than 5 for backup): 1. 2. 3. 4. 5. 6. 7.	Folks lined up for calling are: 1. 2. 3. 4. 5. 6. 7.

Appendix 4: Interview Schedule List

REMEMBER! Make sure they have MORE than enough time to meet. And find a quiet comfortable place to meet. Make sure it's a place where other won't overhear or listen to the conversation...

	Name	Date & Time	Where	Today's date is:	Notes (special needs or something to prepare?) Example: "location may change, confirm a day before appt. by phone"
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					

Appendix 5: Confidentiality

Before beginning any interview, you must decide how you want to approach issues of confidentiality and safety..

Consent

Have them sign a consent form. This is generally good practice (sample consent form provided on next page). Consider sending back the transcript to interviewee for review and sharing findings. Do not release any information that may identify interviewee unless they have given you permission.

Less formally, you can ask for consent on tape. Ask them at the start of the interview on the tape if they agree to the interview, to being recorded and included in the project analysis. Say the date and time.

For projects that may want to release individual stories, you may ask what parts of the interview they would want changed in order to remain confidential:

- Full or partial name of themselves or others in the stories
- Age
- Organizational affiliation
- Profession / Traditional Role in community
- Where the story takes place
- Gender
- Race/Ethnicity

Appendix 6: Sample Consent Form:

What the interview is about: The purpose of this project is:

What you are to do: You are asked to participate in a recorded interview about _____ for approximately ____ (duration).

Compensation: There will be no monetary compensation.

Taking part is voluntary: Taking part in this interview is completely voluntary. You may skip any questions that you do not want to answer. If you decide to take part, you are free to withdraw at any time.

Your answers will be confidential. The records of this project will be kept private. In any sort of report we make public we will not include any information that will make it possible to identify you. Research records will be kept in a locked file; only (who) _____ will have access to the records. (Regarding the storage of the tape, who will keep it, where will it be stored, after the transcription is done?) _____

If you have questions: (contact)

You will be given a copy of this form to keep for your records.

Statement of Consent: I have read the above information, and have received answers to any questions I asked. I consent to take part in the project.

Your Signature _____ Date _____

In addition to agreeing to participate, I also consent to having the interview tape-recorded.

Your Signature _____ Date _____

This consent form will be kept by the researcher for at least ____ years beyond the end of the project and was approved by the (Organization) on (date).

Appendix 7: Glossary

Analytic Induction: a qualitative research method that begins with a rough hypothesis, which is modified through the examination of cases that don't fit the hypothesis.

Closed Questions: questions that elicit a yes/no response.

Code: a word chosen to represent an idea, topic, or event that is an important theme of the interviews. After these words are decided on, they are connected to colors or symbols used to mark passages of the transcripts.

Coding: the process of marking passages of the interview's transcript that are about the same thing. By same thing we mean—the passages have the same phrases repeated in them or they talk about the topic in the same way. These passages are marked with a name, the code, which is usually connected to a longer explanation of what the passages have in common. Codes stress what themes run through the interview or the collection of interviews.

Community Assessment: a collaborative process of gathering, analyzing, and reporting information about the needs of your community and the strengths that your community can use as tools to meet those needs.

Cultural competence: a consciousness, knowledge and skill to work effectively in cross-cultural situations that is grounded in a self-awareness of one's own personal and cultural values and beliefs.

Deductive Analysis: a type of analysis that begins with theoretically derived hypotheses then tests them with data that were collected in accordance with the theoretical context.

Grounded Theory: a qualitative research method in which theory is developed after data has been gathered and analyzed.

Inductive Analysis: a type of analysis that begins with collecting and analyzing data, after which hypotheses are made.

Interview: a conversation with one person (see key informant). In this research tool, a variety of open-ended questions are created beforehand that direct the conversation, although the flow is guided by the person sharing their story.

Interview Guide: a brief list of questions to direct conversation and make sure key issues get discussed. The guide should be flexible to move with conversation but at the same time its main purpose is to keep the interview on topic.

Interviewer Bias: the influence of the interviewer on the interviewee, which affects responses.

Key Informant: a person who knows what is going on in the community.

Leading Question: a question that is phrased in a way that suggests to the interviewee an answer that the researcher prefers.

Loaded Word: a word that has positive or negative connotations and can influence the interviewee's response to a question.

Oral History: a term that can either refer to the form of research that is based in conducting interviews or it can refer to the interview themselves (verbal information about past or present events).

Participatory Research: a type of social research in which the people being studied have significant control over and participation in the research.

Probes: areas you want to go more in-depth in an interview.

Qualitative Data: a way of collecting information using words. From the words, you are able to pull out themes, concepts, and stories.

Theoretical Discovery: a research process aimed at formulating an original theory.

Theoretical Extension: a research process aimed at extending preexisting theories to settings other than those in which they were intended to be used.

Theoretical Refinement: a research process aimed at modifying existing theories through close inspection of the theoretical concepts with new data.

Transcription: the process of turning audio or video recordings into a typed format.

About the DataCenter

Founded in 1977, **DataCenter** unlocks the power of knowledge for social change. We support grassroots organizing for justice and sustainability through strategic research, training and collaborations. We use research to help move the knowledge and solutions of communities of color and the poor from the margins to the center of decision-making.

For more information about our programs please visit our website at www.datacenter.org or email us at datacenter@datacenter.org

We work in collaboration with grassroots social justice groups to provide campaign research support, and are building our expertise to assist groups with community research. If you are developing a social justice campaign and want assistance with a community research project, please contact us. We will do our best to assist you ourselves or point you towards others who can help you out.

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