

# Team-Based Inquiry

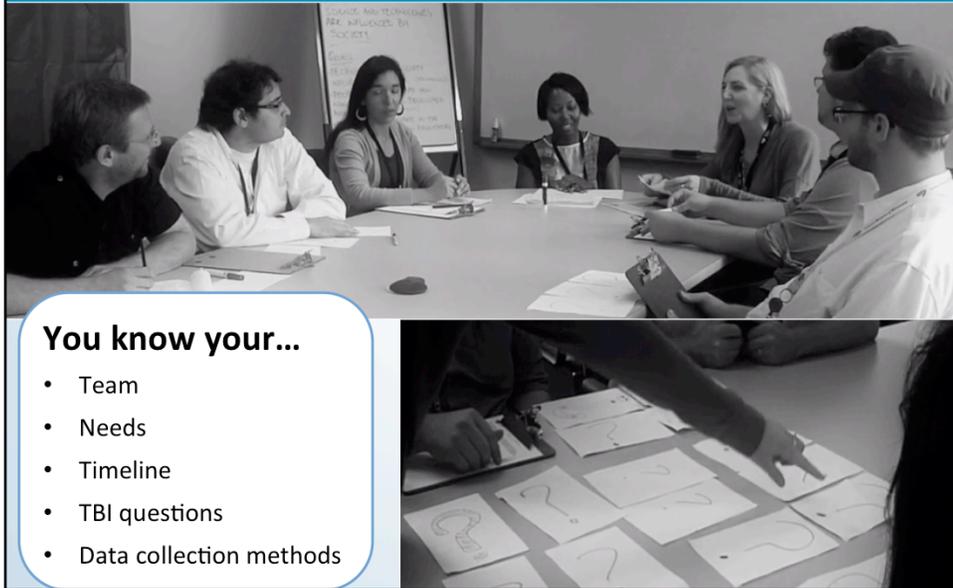
## Investigate: Part 2



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This presentation will walk you through the second half of the Investigate Phase – collecting data!

## You are ready to collect data!



By now, you have identified your TBI team, defined the project's needs, defined the project timeline, identified your TBI questions, and selected the best data collection methods. Now you need to bring those methods to life and take your data collection instruments out onto the museum floor or into your program!

## We will NOT cover creating instruments



Don't overwhelm yourself or your team by trying to do TOO MUCH!



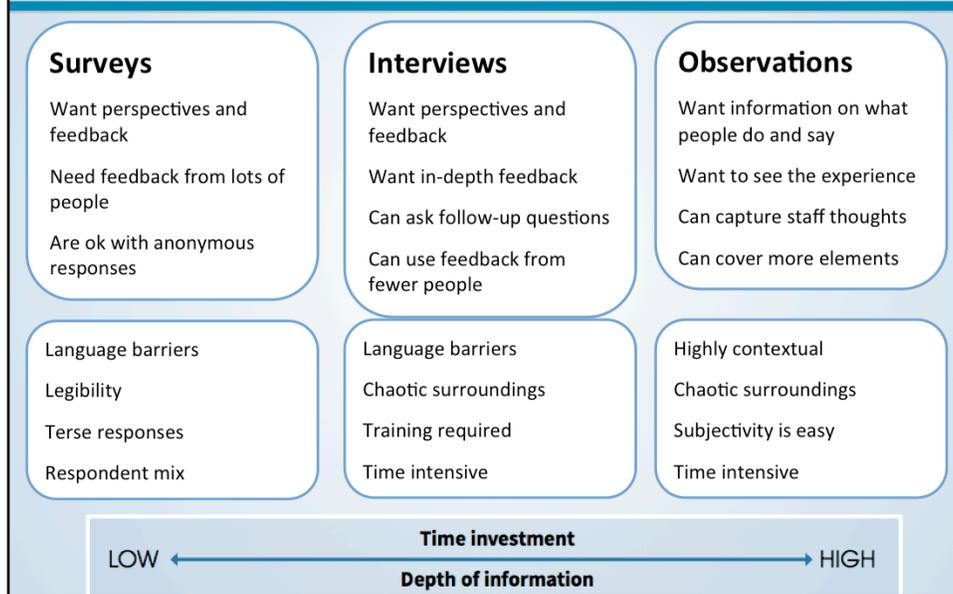
1. Keep it short
2. Keep it simple and clean
3. Write out everything that you want to capture
4. Ask a question – end with a ?
5. Be clear and direct
6. If relevant, leave space for observer comments and reflections

Unfortunately, we won't be able to cover the process of developing your data collection instruments, both because instruments are highly contextual and need to be created to best fit your project's needs AND because creating instruments could take a couple of videos all by itself!

The biggest elements, though, are to remember not to reinvent the wheel every time you need to create an instrument – start from something that already exists.

With everything, regardless of the method, keep it as simple as possible. The easier it is for you and your team to work through, understand, and feel comfortable with, the better the data collection process will be.

## Recap: Investigate Part 1



In the first half of the Investigate Phase, you considered the strengths and weaknesses of different data collection methods and selected those that will best help you gather the data you need to answer your TBI question. Now that you've got those instruments, you are ready to hit the floor to start gathering data. Each method has its own process, and your project and TBI questions will dictate specific needs, so we are just going to share some fundamentals about collecting data from museum visitors, program participants, and others engaging with your institution.

## Interview Data Collection



We will begin with the interview, because we know we love approaching strangers! Ok, let's be honest: Interviews can be tricky and uncomfortable. But guess what: the techniques and guidelines used to conduct an interview are the same as for conducting surveys!

## Interview Data Collection



**Connection**  
**Collection**  
**Close**

Collecting interviews occurs in three steps: (1) the Connection, (2) the Collection, and (3) the Close. Each of these steps is important for making participants feel comfortable, valued, and respected as they share their thoughts and time with you. Each step is also important for ensuring you collect high quality information.

## The Connection

- Sampling visitors
- Introducing the interview
- Getting informed consent



The “connection” is the time for you to recruit visitors to participate in your interview. This is a crucial step, since visitors are busy folks who may not feel like they have time or patience for an interview. Three important aspects of the connection include: sampling, introducing the interview, and conducting the process of “informed consent.”

## The Connection: Sampling



Sampling is a predetermined method of choosing how to approach visitors. It's important to develop a rule to avoid unintentional bias. Whatever rule you choose for sampling visitors, you will follow it throughout the entire data collection. For instance, you might decide you sample will be: "The next group that completes the activity" or "The third person who looks over the age of 18 to cross my imaginary line."

## The Connection: Introduction



**Consider saying:** “Hi, my name is \_\_\_\_\_, and I work here at the museum. I would love to talk to you about that new exhibit you just used. Could I have a few minutes of your time?”

You will only have a moment to make a positive impression on the visitor you are hoping to interview, so make your introduction short, sweet, and to the point. Often the introduction can be as quick as, “Hi, my name is Sarah, and I work for the museum. I want to ask you a few questions about the activity you just finished. Let's step over here so I can get your feedback!”

## The Connection: Consent

Make sure they say,  
"Yes!"



You need assent from everyone. You also need parental consent for minors and people with disabilities.



People should always have the right to decline to participate. We believe it's important to at least secure verbal permission from individuals before continuing.

You should make special considerations for children, minors, and people with cognitive disabilities, since (A) they may have legal guardians that are responsible for their well-being and (B) because they may not completely understand the trade-offs of participating in a study.

## The Collection: Refusals



At some point, people may decline to participate in the interview. You never want to push someone to participate, but you should clarify why they are declining. Highlight that their feedback is important to improving the museum. If they still decline, let them go, “Thanks for considering. Have a great rest of your day!” Write it down in a refusal log and try to collect data from the next person in your sample. (Refusal logs help you keep track of how and why people are declining, which may help you improve your approach.)

Remember that you are a part of the visitor’s experience—customer service is just as important as collecting data.

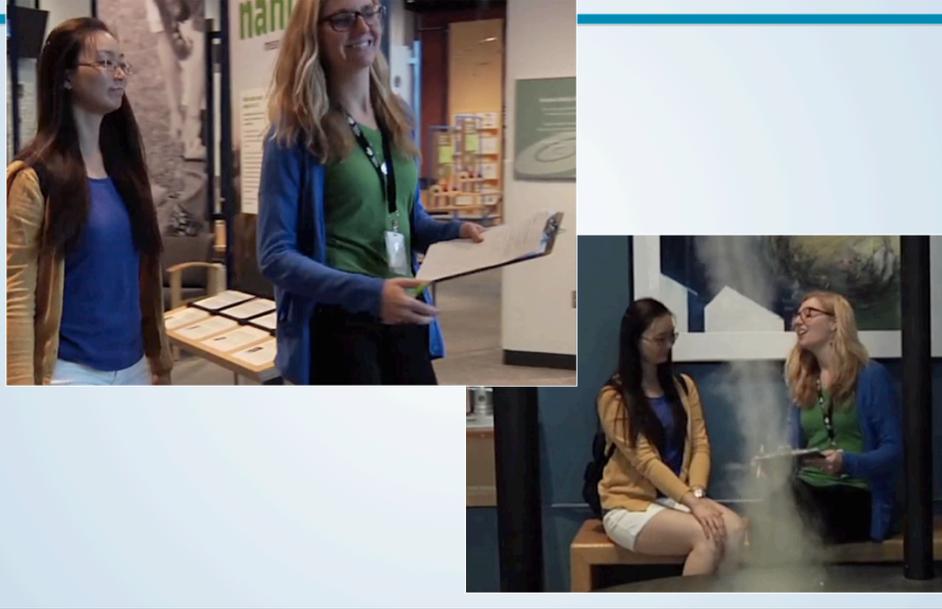
## The Collection: When they say “Yes!”

- Preparing
- Interviewing
- Taking notes
- Probing for depth and clarity



Once participants say yes, you can begin the interview. Four important aspects of collecting interview data are: preparing visitors for the interview, interviewing visitors, taking notes, and probing for depth and clarity.

## The Collection: Preparing



When participants say yes, make them physically comfortable. If possible, move them to a quieter space, allow them to sit down on a chair or bench, or take them out of the flow of traffic. Make sure they have everything they need, such as a clipboard and pencil. Make sure you are not blocking an exhibit or walk-through space because this poor positioning may make you and your respondent uncomfortable later. Feel free to say, “Let’s walk over here to be sure we’re out of the way.” Remember that some visitors will want to be in a certain location so that they can see the rest of their group. Set the expectations about their role, the process, and the length of time.

## The Collection: Interviewing



Maintain positive body language and tone – you are now part of their experience!



Use your interview script to move through the conversation. Depending on whether it's a structured or unstructured interview, you can be more or less rigid about sticking to the pre-defined questions and question order. Throughout, use the questions, your tone, and your body language to establish rapport with the participant and make them feel comfortable. Memorize prompts and questions to maintain eye contact as much as possible.

## The Collection: Taking Notes



- Capture as much as possible.
- Do not paraphrase.
- Ask them to repeat or slow down.

Take the most complete notes you possibly can. Politely ask participants to slow down or repeat themselves as necessary, sharing that you want to make sure you capture everything they are saying. Write legibly and clearly. It is critical to record people's responses in their own words and not paraphrasing. Interviews allow you to ask follow-up questions. Take advantage of this opportunity while still respecting participants' time. In general, use "probes" to clarify participant responses or encourage them to provide more information.

## The Connection: Follow-Up Questions

Make sure you get the depth of answers you were hoping for. If not...

- Ask follow-up, or probing, questions.

Could you give me an example of what you mean?

Tell me more about that.



Why do you feel that way?

Which one of those exhibits was your favorite?

Interviews allow you to ask follow-up questions. Take advantage of this opportunity while still respecting participants' time. In general, use "probes" to clarify participant responses or encourage them to provide more information. Be careful not to lead participants.

Probing Questions: When interviewing, visitors may give responses that are unclear or do not address the question posed. Sometimes simply repeating the question helps to get a clearer or more relevant response. Other times, it may be necessary to ask a probing question. If after asking one probing question the response is still unclear or irrelevant, make note on the data collection sheet that you asked a probing question but the visitor still did not provide a clear or relevant response.

Examples of probing questions: Is there anything else? Any other reasons? (These are good probes if the question is asking for one or two responses. If they only give one response you can ask one of these questions to see if they have another response.) Would you explain further? Would you give me an example of what you mean? Could you tell me more about what you were thinking on that? Why do you feel that way?

## The Close

- End on a positive note
- Review interview data
- Prepare for the next interview



Closing the interview is just as important as the introduction for creating a good visitor experience. Three important aspects of the close are: ending on a positive note, reviewing interview data, and preparing for the next interview.

## The Close: Thank you!



Thank you gifts are a great way to show appreciation!



Once you have finished the interview, thank the visitor, ask if they have any questions, and wish them well. This is also a good time to provide a thank you gift, if your study warrants it – if you took more than five minutes of a visitors' time, you should consider providing a tiny thank you gift, be it a sticker, a pencil, or a bookmark.

People often ask what you plan to do with the information you are collecting. Feel free to tell them that their feedback helps the museum measure the success of what they have created and make future activities/exhibits/programs even better! If someone is really interested, you can consider offering to share the report with them once the study is complete, but this will depend on the study.

## The Close: Review Your Data



When you complete an interview, take a few minutes to go through the interview to make sure that you included all information, have written out abbreviations, and someone else will be able to read your writing. Ensure that all questions are understood by the individual and that all the questions have been answered.

Take as much time as you need to look over your data collection sheet when you finish with one visitor. Make sure everything is filled in correctly and legibly, including any information about the group number, data collector initials, activity name, date, etc. Spending a little time double-checking your sheet will save time later during data entry and analysis.

## The Close: Prepare to go again!



Store the completed interview form somewhere safe and out of the way, making sure that the last interview form cannot easily be picked up by someone else—remember, you promised the data would be secure. Grab a new form, take a deep breath, and begin again! It's important not to rush through this process, since you want to make sure that you collect high quality data and are completely ready for each interview.

# Interview Activity

**Participant Interview** NISE 

All my name is ..... Today we are asking for feedback to help us improve the program you just saw. Your responses will be completely anonymous. Do you have a brief moment to help us out by telling us what you think?  
-< if yes, proceed -> if no, end with: "No problem. Enjoy the rest of your visit."

**1. What did you like most about this activity? Why is that?**

<probe> Anything else? Can you tell me more about that?

**2. What are some ways this activity could be improved? Why is that?**

<probe> Anything else? Can you tell me more about that?

**3. In your own words, what would you say this activity is about?**

<probe> Anything else? Can you tell me more about that?

**4. Would you mind telling me how old you are?**      **5. What is your gender?**

**6. Who are you visiting with today? <read responses>**

I am here alone.

I am with a school or tour group.

I am here with family or another social group that includes children/youth and adults.

I am here with family or another social group that includes adults only.

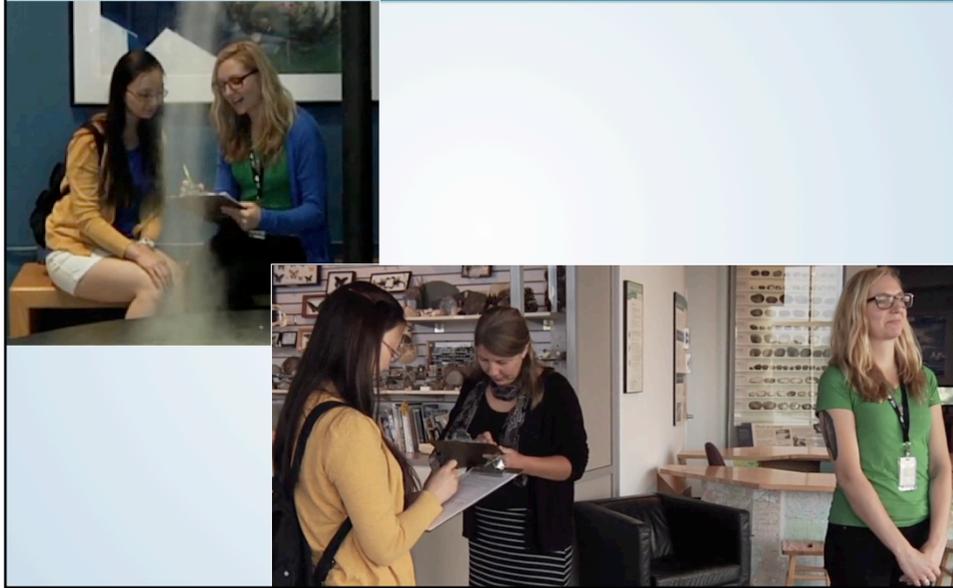
**7. < if visiting with children> Could you tell me the number of children/youth you are visiting with in each of these age groups:**         under 2         2-5         6-8         9-12         13-17

Thank you for your time and feedback! Do you have any questions for me?



Using the interview template in the TBI Guide Appendix, practice interviewing colleagues or others on your TBI team, just to get the hang of it. In particular, think about practicing your quick introduction, asking follow up and probing questions, and in memorizing the questions, to make it more of a conversation.

## Interviews versus Surveys



The biggest difference between surveys and interviews is whether you are having a conversation with the visitor or waiting for them to complete the questionnaire. For a survey, all of the same rules apply, but instead of engaging with them or looking at them during the Collection portion, hand over the questionnaire and step back to give them space. Give them a bit of room and privacy to complete the survey. When they are done, you can skim the survey to make sure they did not miss any pages or questions, but always allow questions to be purposefully skipped.

## Observations

- What do we need to observe?
- How do we need to observe people?
- Can they know we are watching them or do we need to be unseen?



Before going out to observe people, decide whether you need to observe unobtrusively, without people knowing they are being watched. If you are trying to see how people naturally use an exhibit or a space, you probably want to remain in the background. If it doesn't matter if they know you are there, consider asking the visitors if you can watch them before you begin... for transparency's sake.

Of course we know that people do act differently when they know they're being observed. Let the context of the study decide, then stick with your decision for the entire study.

## Identify the Observation Space



Clearly identify the boundaries of the area you are watching—if you are observing a space, where is the line that denotes when you will start watching someone and when it ends? Make sure everyone collecting data uses the same rule.

## Observations: Let people know



At all times, make sure to put out signs telling people that they may be watched in a specific area. Just like with interviews and surveys, you want to give people the opportunity to decline participating in your study.

## Observations: Note taking

Write down exactly...

- What you see
- What statements and discussions you hear



When you are observing, remember to capture actual actions and verbalizations. Do not paraphrase or analyze while you are collecting the data—that comes next.

Go collect data!

I ♥ good data



Once you have your data in hand, go to the next presentation to learn more about entering, cleaning, and analyzing it.



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