

## Not Another Survey! Use Interviews Instead to Understand Needs in Your Library

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### Abstract

Assessment in libraries is an essential part of managing library resources to meet the needs of patrons and stakeholders. This paper discusses the advantages and disadvantages of two assessment devices—surveys and interviews—in particular as they apply to libraries.

### Introduction

Surveys seem to be everywhere. Everyone wants to know what we think so they can predict how we will vote, what we will buy, or maybe, what we really want from our library. While these surveys are given with good intentions, we get tired of them. Plus, surveys are used to try to understand our opinions through the limited view of tightly worded, prepackaged questions, often with a numeric range as our only way to respond.

There is an alternative! Interviews can provide “a deeper understanding of social phenomena than would be obtained from purely quantitative methods, such as questionnaires” and are “most appropriate where little is already known about the study phenomenon or where detailed insights are required from individual participants” (Gill et al. 2008, 292). Additionally, interviews can leave participants feeling that they have really expressed themselves and that the organization asking the questions really cares. After all, who doesn’t like talking about their opinions to someone who will actually listen?

However, interviews are more complicated and time-consuming than surveys. The battle between these two assessment tools is captured well by Irvine (2018): “In the red corner, weighing in at a hefty time commitment and a massive transcription job, we have . . . INTERVIEWS! In the blue corner, weighing in at a stack of paper and variable data quality, we have . . . SURVEYS!”

Clearly, surveys and interviews have different pros and cons. In general, surveys are effective for the following:

- Answering standardized, relatively simple questions
- Allowing for a large number of respondents
- Creating summary reports with relative ease

Interviews, on the other hand, are useful for achieving these aims:

- Creating a more personal connection
- Dealing with subtle human issues
- Allowing for follow-up and probing questions
- Easing the information-gathering process for the respondent—although interviews can be harder on the researcher (Valenzuela and Shrivastava 2002, 3)
- Asking questions that are better answered with descriptions than numbers

- Exploring trends and experiences and coming up with common themes (Beck and Manuel 2008)

Another factor to consider when deciding whether to use surveys or interviews for assessing how your library is doing is participation rate. People are busy. Who has the time to participate in either a survey or an interview?

Imagine you have just completed a great reference interview. If you try to get information on that experience by doing a survey, will the patron really remember to go online later to complete it? What if you give them the survey while they are still there? “Hang on, I know you got what you needed and are ready to leave, but could you just take a couple minutes more and fill out this survey . . . that you really don’t want to do?”

What about the interview scenario? If it’s hard to get people to do a brief survey, it certainly won’t be any easier to get them to sit down and talk with someone for a while. Right?

Actually, this is where interviews can shine if done correctly. Since you don’t want to do many interviews—otherwise you will be overwhelmed with processing the data—you have the opportunity to be selective. Only choose a few people and arrange times when they can talk or take a call. If they accept your invitation, they will likely feel curious and maybe even a bit important. Additionally, Wharton (2017, 199) conducted research at Florida State University Libraries and found that “the limited participant pool and one-on-one aspect of the qualitative method was also beneficial for the level of willingness to participate.” People are often more willing to talk with someone about how they feel than to wade through a sterile survey.

Are there other reasons for doing interviews? Yes. Research experience shows that interviews can help develop a deeper understanding regarding specific library needs. Hill and Patterson (2013, 411) found that “firsthand student responses greatly enhanced librarians’ knowledge of how students use and view the online library.” Additionally, Wharton (2017, 197) found that for libraries, “there is no better substitute for learning [about] a particular population than engaging in personal interactions with constituents.”

Based on the benefits described above, this paper advocates using interviews as another tool for understanding needs in your library and provides guidelines on how to do them. Please note: this paper focuses on individual interviews, not focus-group interviews. For excellent insights on how to do focus-group interviews in libraries, consult Walden (2006) and Hughes-Hassell and Bishop (2007).

### Structuring the Interviews

Let’s assume you are comfortable that interviews are a good way to go. The next question is, should you do them in person or remotely via phone or video chat? To answer that question, consider these factors:

- Time and financial costs
- Geographical distribution of respondents
- Sensitive and controversial topics
- Technology problems
- Interviewer safety
- Note taking

- Interaction effects
- Nonverbal language and cues (Oltmann 2016, 1)

While remote interviews are convenient and can save time and travel expenses, they will not allow as much of a personal connection to be made. Another factor is that the recording quality will likely be lower (which will affect auto-transcribing accuracy). As a general rule, if you can do in-person interviews, you will be glad you did.

However you conduct the interview, you will also need to decide what type of interview matches the needs of what you are researching. There are basically three ways to design interviews (Wilson 2012, 96):

- Structured
  - The interviewer asks the same questions to each participant.
  - Using consistent questions makes it easier to process the responses but can be limiting.
- Semi-structured
  - The interviewer uses a set of guiding questions.
  - This approach allows for more flexibility.
- Unstructured
  - The interviewer has an idea they want to pursue.
  - The interview proceeds like a conversation.

You can also mix these as needed. Additionally, Dilley (2000) suggests using journalists as examples in deciding which interview approach fits the nature of your research. Think about what kind of setting and interactions would allow you to get the real story and bring you a little closer to the Pulitzer Prize you know you deserve.

### Choosing Interview Candidates

The people you choose to interview will make a big difference on the type of data you collect. Choose someone who is as directly involved with what you are researching as possible. Conduct interviews in a timely manner, as soon as possible to the related event you are researching. Avoid selection bias. You may want to have different ages, genders, races, etc. represented in your sample. However, if your study is to determine the needs of teenagers using your library, it won't make sense to include elderly patrons. This highlights a difference between reasons for random sampling vs. deliberate selection. In general, keep in mind the overall demographics of the group you want to study and be sure to select people from among those demographics without inadvertently choosing people you happen to prefer for some personal reason (Collier 1995).

Do not interview too many. The whole process will take a lot of time and more interviews will just compound this. How many interviews should you do? The number depends on the nature of the research you are conducting and when you reach "saturation" (the point at which no new themes are identified by conducting further interviews). However, fifteen to twenty people is a reasonable range to work with (Baker and Edwards 2012).

As an example, let's say you want to determine how effective your library's search tools are. Can patrons find what they are looking for? What roadblocks do they run into? You could watch for people who are spending a significant amount of time using the online catalog and invite them to participate in an interview. Or, if you're interested in the preferences of those who

use your library's video collection, you could choose varying times of the day to approach people who have checked out videos once they have finished at the circulation desk.

As you approach people about being interviewed, you may find that referring to the interaction as a "conversation" will help put them more at ease. Wharton (2017, 199) noted that their "Distance Librarian chose to frame the interactions as conversations with the hopes that responses would be as open as possible. These in-depth, personal interactions provided a distinct perspective into the users' needs." Using words like "interrogation" or "inquisition" is probably not a good idea. (Just in case you were wondering.)

### Preparing the Interviewer

The way the interviewer acts will set the tone for the whole meeting. You need to make sure they are well prepared and can maintain a comfortable environment. People who come to the library are used to interacting with personnel who are professional, helpful, and even friendly. They will expect the same when they participate in an interview.

In addition to having a big effect on the interview experience, the interviewer can inadvertently cause bias (Valenzuela and Shrivastava 2002). To avoid this, they should practice asking questions and responding to comments in ways that don't inject their own opinions or lead the person being interviewed. Think pleasant and neutral.

You should also prepare the interviewer with ways to handle different types of people they may interview, such as "dominant talkers, long-winded participants, the 'expert' type, argumentative types, and the shy person." In these cases, the "interviewer needs to be prepared with techniques and tactics to move the interview along, quell a potential argument, or draw out a reticent participant" (Wilson 2012, 97).

### To IRB or Not to IRB

The Institutional Review Board, or IRB, is "an administrative body established to protect the rights and welfare of human research subjects recruited to participate in research activities conducted under the auspices of the institution with which it is affiliated" ("What Is the Institutional Review Board?"). Depending on the nature of your research and how you conduct it, you may need to get IRB approval to make sure all the necessary protections are in place. In general, IRB approval is needed for interview-based research if any of the following apply:

- You plan to publish or present the results
- You are researching sensitive topics
- You are interviewing minors (under age eighteen)

If you plan to use the results only for internal purposes (and you aren't dealing with sensitive topics or minors), you probably won't have to worry about IRB approval. That being said, this paper is not intended to be an official guide to determine the need for IRB approval. Be sure to contact your organization's IRB to check.

Most universities have IRBs. If your library is not part of a university, you may want to check with the municipality, school district, or business that your library is part of to see how they would handle research where protections similar to those provided through the IRB process are warranted.

If you do need to apply for IRB approval, follow the process they provide. It will likely require:

- An application in which you define who the PI is (no Magnum, P.I. here—just the Primary Investigator)
- A biographical sketch of each researcher on the team, describing their training and qualifications
- A list of questions you will ask or topics you will discuss
- The consent form you will ask interviewees to sign
- Copies of any materials you will use to recruit or invite people to participate

## Creating Questions

The goal of an interview is to get deep, rich information from people in a way that only an interactive conversation can. To structure the conversation, you need well-designed questions “to collect data about the same event with different interviewees” and to provide a framework to “keep on target and obtain relevant information” (Scheibelhofer 2008, 406). Additionally, Jacob and Furgerson (2012, 1) describe a good interview as helping “nurture people through the storytelling process.” Here are some ideas to make all that happen. Begin with easier questions, and work toward more difficult ones. This approach helps get people warmed up. Imagine you are the person being interviewed. What would you want to say? Formulate questions that give that opportunity to the interviewee. You have reasons for doing this research. What do you need to know in order to accomplish those purposes? Create questions that will draw that information out. Keep the interview fairly brief—less than thirty minutes. You don’t want to wear out your interviewee. Also, you will have to do the transcribing and coding later and will regret it if you go on and on. Use open-ended questions. They allow more room for interviewees to respond in their own ways and based on their own experiences.

## Conducting the Interviews

A bit like a blind date, an interview will go better if you follow protocol. Some researchers use the term protocol to describe the framework for making an interview successful. This framework is “not only a set of questions, but also a procedural guide for directing a new qualitative researcher through the interview process” (Jacob and Furgerson 2012, 2). It also provides “a guide to the journey we want our respondents to take [and serves] as a path we suggest for them to point out landmarks and markers they think are important for us to understand” (Dilley 2000, 133).

Protocols should include:

- What to say before and after the interview, including a description of the purpose of the research
- A reminder to collect the signed informed-consent document from each interviewee if your research is under IRB approval
- A reminder to give a printed copy of the questions to the interviewee
- Directions on how to set up audio equipment and to confirm it is working(!)
- Instructions on what to do with files, how to backup data, and protect privacy

If you had to get IRB approval, be sure to keep any discussion with the interviewee within the bounds of what was included in your application.

Additionally, remember that the person being interviewed should do most of the talking. According to Dilley, “one rule of thumb is for interviewers to talk 20 percent of the time during the interview, and listen 80 percent” (2000, 133). Depending on the topic being researched, the interviewer may want to talk even less.

## Recording the Interviews

To record interviews, you will need a good microphone and capable software. There is no need to go overboard, but a good mic can make a real difference in the recording quality. Whether you use a laptop computer or your phone, your device’s built-in mic will not record as well as a decent external mic. Good USB and phone-connectable mics are available for fifty dollars or less. Better sound quality makes transcribing the interviews easier, especially if you use automated transcription, which will be discussed later.

For software, there are several free options. Audacity is an excellent choice for Windows, Linux, and iOS devices but does not run on Android. Easy Voice Recorder, from Digipom, will do a good job on Android. Windows Voice Recorder is a bit too limited to do what many people will want for interview purposes. There are many audio-output formats, each with its own advantages and disadvantages. An uncompressed format like WAV will give the highest possible quality but will also have a larger file size. A compressed format, like the popular MP3, will have a smaller file size but will also have lower audio quality. In general, WAV is a good choice unless you really need to keep file sizes down for easier storage or file transfer.

Another consideration for recording interviews is the environment where the interview will take place. The quieter the better. Yes, libraries are famous for being quiet, but keep in mind that any background noises and conversations will make transcription difficult. Also, avoid places that are echoey. An empty storage closet would not give the best recording quality.

## Transcribing the Interviews

At some point, you will need to convert all that recorded talking into written words. Automated transcription services are pretty good, but you will definitely need to review their output and make corrections. There are several online options. Prices range from \$0.25 to \$1.00 per recorded minute, and accuracy claims range from 80 to 90 percent. Turnaround time is usually in a few minutes. The tips included in the previous section on improving the recording quality will increase the accuracy of any automated transcription service you might end up using.

Also, automated transcription services can inadvertently add a little humor to your project. I used a service that did a great job, but in one case, it took the interviewer statement “In fact we’ll get to that” and converted it to “I’m thankful to God.” Who knew that library research could provide an opportunity for evangelism?

With other services, humans do the transcribing. Human transcription service prices range from \$1.25 to \$4.50 per recorded minute, and accuracy claims range from 96 to 99 percent. Turnaround times can be as short as a day or two or as long as a few weeks, depending on how much you are willing to pay. Human transcription services may be especially helpful when people on the recordings have unique accents or use a lot of technical jargon. They are better at getting punctuation right and differentiating between words that sound the same too.



Yet another option is to do it yourself or give it to someone who works in your library, depending on the spare time, patience, and typing skills that you, your colleagues, or student employees have.

## Protecting Privacy

Depending on the sensitivity of the information, any IRB requirements, and who will review the transcripts, you may need to create deidentified versions of each transcript before allowing others to review them. To do this, you can replace the name of the person who was interviewed—along with any other references to names, places, or institutions—with code numbers. Code numbers allow data to be grouped, which may be useful later. Just create a decoder spreadsheet that will allow for correlation as needed. Also, be sure to store all the files in a secure way.

## Creating Codes

A code is “a word or short phrase that symbolically assigns a summative, salient, essence-capturing, and/or evocative attribute for a portion of language-based or visual data” (Saldana 2008, 3). One technique for generating codes is to have several people read the transcripts and write on sticky notes the themes they notice. You can have reviewers read the same transcripts for comparison or just have them read different transcripts, depending on how many reviewers and transcripts you are working with. Then, have the reviewers meet in person and group their sticky notes by theme on a big whiteboard, as shown in figure 1.

Having more than one person involved in identifying and grouping themes will help bring multiple perspectives and interpretations. You want that. There will be a lot of back-and-forth as some themes match up well and others don't, but you should be able to get them into broad groups. Finally, create a heading for each group that adequately represents the intent of those sticky-note themes, as shown in figure 2. These headings become your categories. The individual sticky notes will become your codes once you consolidate and tighten up the language of related notes.

Depending on how you differentiate between categories and codes, a good number of categories is between eight and fifteen, including a “miscellaneous” catchall to use as a placeholder for later consideration. However, the final numbers will depend on the nature of your research (Saldana 2008). If you have too many categories and codes, you may feel frustrated as you try to consolidate the data into something meaningful. If you have too few, you may have important information that has no place to go.

## Applying the Codes

The process of applying the codes involves taking specific ideas or quotes from the transcripts and classifying them under the codes you created. It can be time-consuming, so plan accordingly, but this is when it gets exciting because all that talking starts to become data.

Each transcript should be read carefully, looking for key points, ideas, or concepts. These are then correlated to the codes so that patterns can start to emerge. Ideally, you will have two people review each transcript. If the two reviewers cannot agree on how to code something, it can be helpful to have a third person available to be the tiebreaker. In some cases, having two or three people involved in the coding process may not be possible, but it can provide helpful checks and promote objectivity.



**Figure 1: Putting sticky notes on whiteboard**



**Figure 2: Creating headings for sticky-note groups**

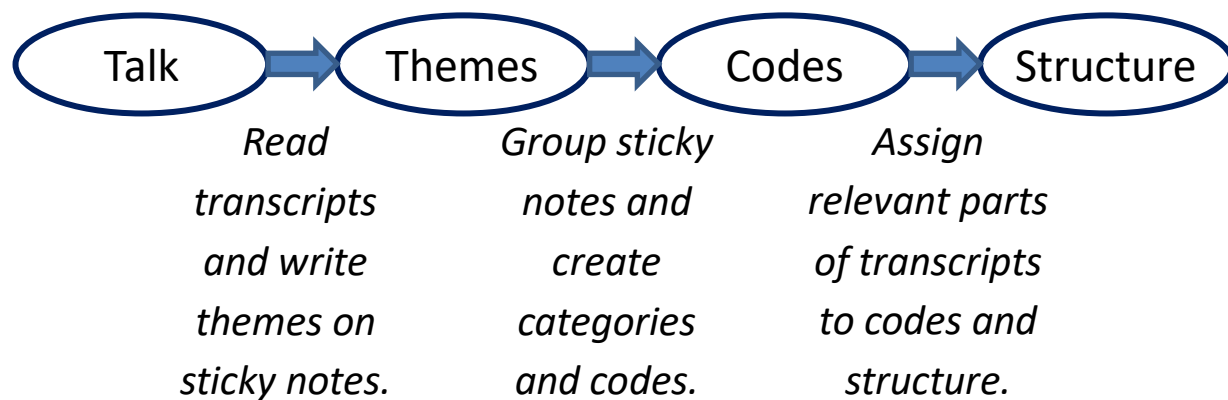
Whoever does the coding will need clarification on the definitions and intent for each code. Additionally, they may benefit from some general training on the practice of coding itself. A good article to get them started is “Thinking about the Coding Process in Qualitative Data Analysis” (Elliott 2018).

Depending on the complexity of your research and the number of interviews you conduct, you may be able to simply use a spreadsheet to track everything. For example, you could use columns for the codes and rows for the interviewees’ names (or their code numbers, if you created them). Then just copy sections from the transcripts and paste them into the corresponding spreadsheet cells. For more extensive projects there are excellent qualitative-research software products—such as NVivo, Dedoose, or Quirkos—that can be very helpful. Just do an Internet search on “qualitative research software” to find several options.

### Reaching Conclusions

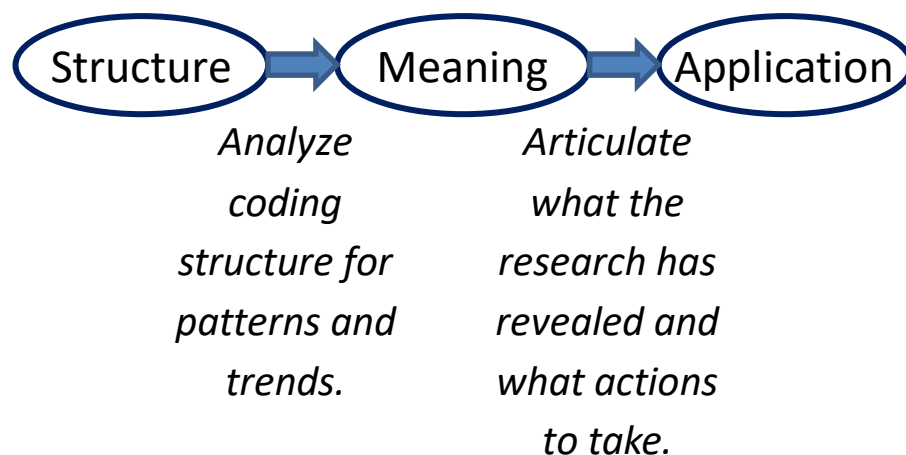
The journey you have been on since completing the interviews can be summarized as going from talk to themes to codes to structure. These steps, with the corresponding actions that lead from one to the next, are shown in figure 3.





**Figure 3: Steps from talk to structure**

Now, you are ready for the last two steps: going from structure to meaning and then to application. These steps, with the corresponding actions that lead from one to the next, are shown in figure 4.



**Figure 4: Steps from structure to application (adapted from Malterud 2012)**

These last steps are where it all comes together. Once the codes and structure are in place, you are ready to look for the big picture. Suter (2012, 351) notes that “conclusions in qualitative research are typically derived from identified patterns and uncovered conceptual, not statistical, relationships.” Similar to earlier parts of the research process, looking for the big picture is best done with a group, to allow for multiple perspectives and to reduce individual bias. Keep an open mind, consider all possible directions, and avoid just looking for things that confirm your original thinking. In particular, pay attention to broad themes, common or recurring issues, unique and noteworthy nuggets, trends, unexpected views, and actionable and worthwhile requests.

Based on what you notice, articulate specific areas the research has shown to be important and then identify specific actions that could address those areas. You may run into some outlier opinions or ideas. They may represent lone voices of reason in the wilderness or

just someone who didn't get enough sleep the night before. You will have to be the judge on if certain ideas are worth considering or if they should be disregarded. Don't be shy about amplifying the voices of those you've interviewed. They rely on your library and have entrusted you with their opinions. Do something with them.

## Conclusion

As you try to understand the needs and behaviors of your library's stakeholders, the interview is a tool you should consider. "The research interview is a pivotal source of data in social research" (Hiller and DiLuzio 2004, 2). Interviews are better than surveys when dealing with subtle or complex issues or when more probing and thorough investigation is needed. Compared to surveys, interviews are usually more complicated and take more time. However, they can provide a refreshing alternative for interacting with those whose opinions you want.

To prepare for interviews, you will need to evaluate the benefits and drawbacks of doing them in person or remotely, as well as how the questions should be structured based on what you are researching. Care must be taken in choosing who you will interview and how you will approach them. The person doing the interviews has a lot of influence on how comfortable and forthcoming the interviewee will be. Make sure the interviewer is well prepared and careful not to inadvertently introduce bias by how they ask questions or respond to answers.

IRBs are essential in protecting people who are subjects of research. In general, IRB approval is needed when you plan to publish or present the results of your research, you are dealing with sensitive topics, or minors are involved. An interview protocol can help the interviewer remember all the things to do, say, and ask, as well as how to comply with any IRB requirements.

Choosing the right tools for recording interviews makes a big difference in recording quality, which, in turn, makes a big difference in the process of transcribing the recordings. Care should also be taken in how you use and store the recordings and transcriptions so that the privacy of those involved will be protected. Coding is the process of taking key points from the transcripts and assigning them to elements of an organizational scheme. Once the statements are coded, you can look for big ideas, patterns, and trends that will allow you to reach conclusions and decide what actions to take.

Don't be afraid to break from the pack of survey givers. The interview process can yield meaningful insights and give you an opportunity to really connect with people in your library.

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