



Interviews, Surveys, or Both?

Design Considerations

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Objectives

After this session, participants will be able to:

- Explain the five parts of Maxwell's **model for research design**
- Describe the **strengths and limitations** of interviews and surveys as research tools
- Identify the characteristics of an effective **interview protocol**
- Identify the characteristics of an effective **survey**
- Develop a **draft** of an interview protocol or survey



A Model for Research Design

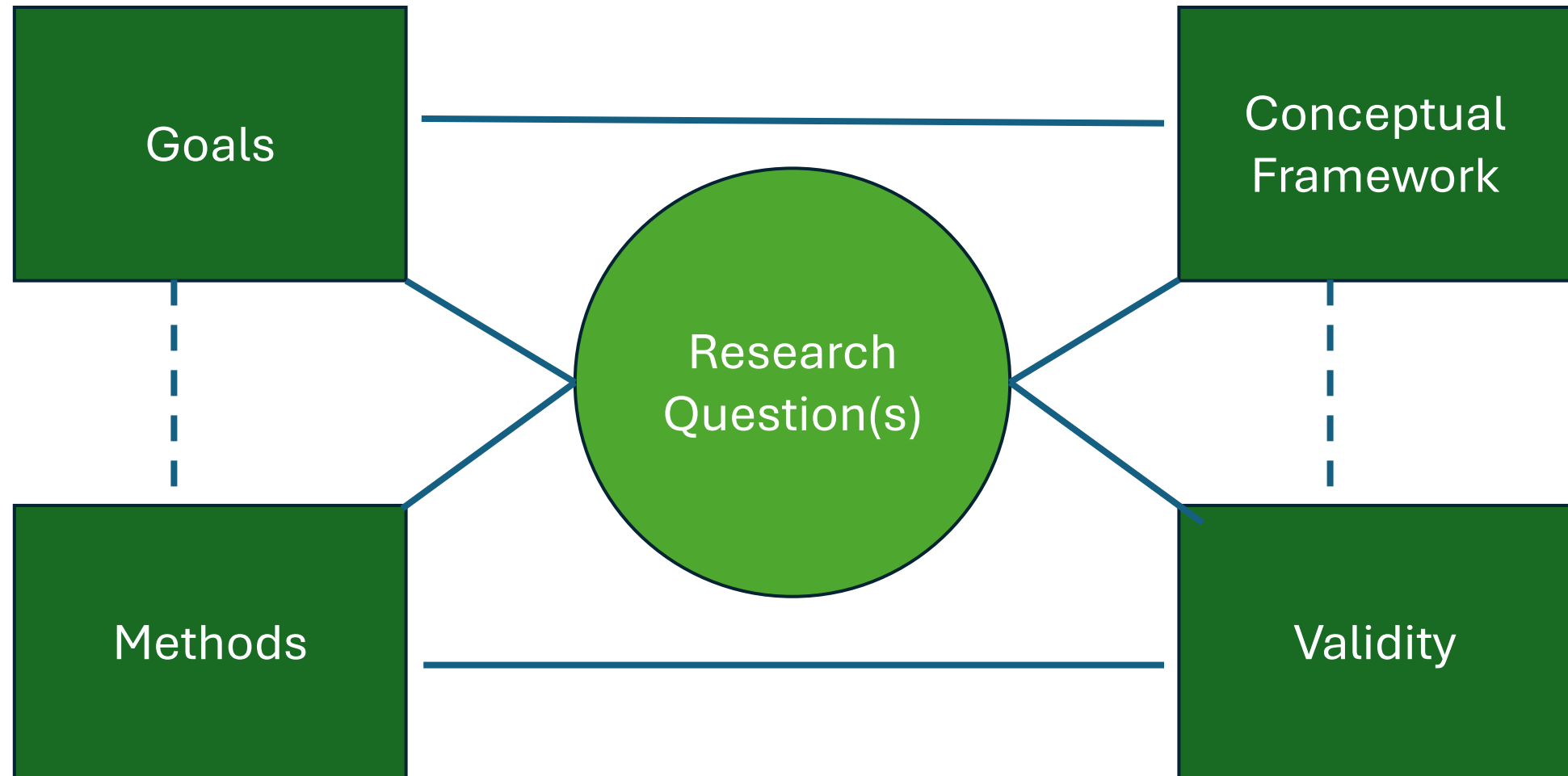


Research Design: A Juggling Act



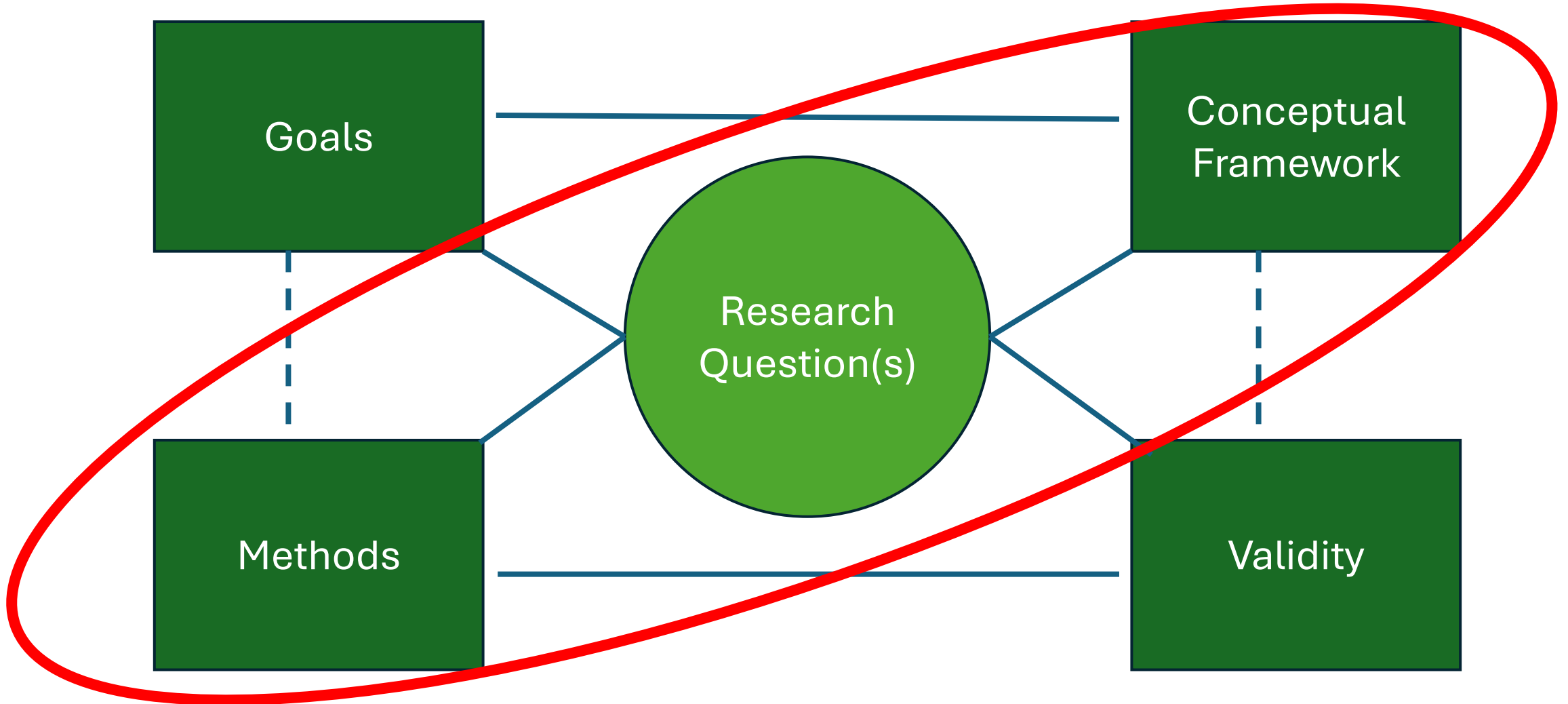


Maxwell's Framework for Research Design¹





How Aligned Is Your Design? (See Worksheet)





Data Collection: A Window into Methods Design



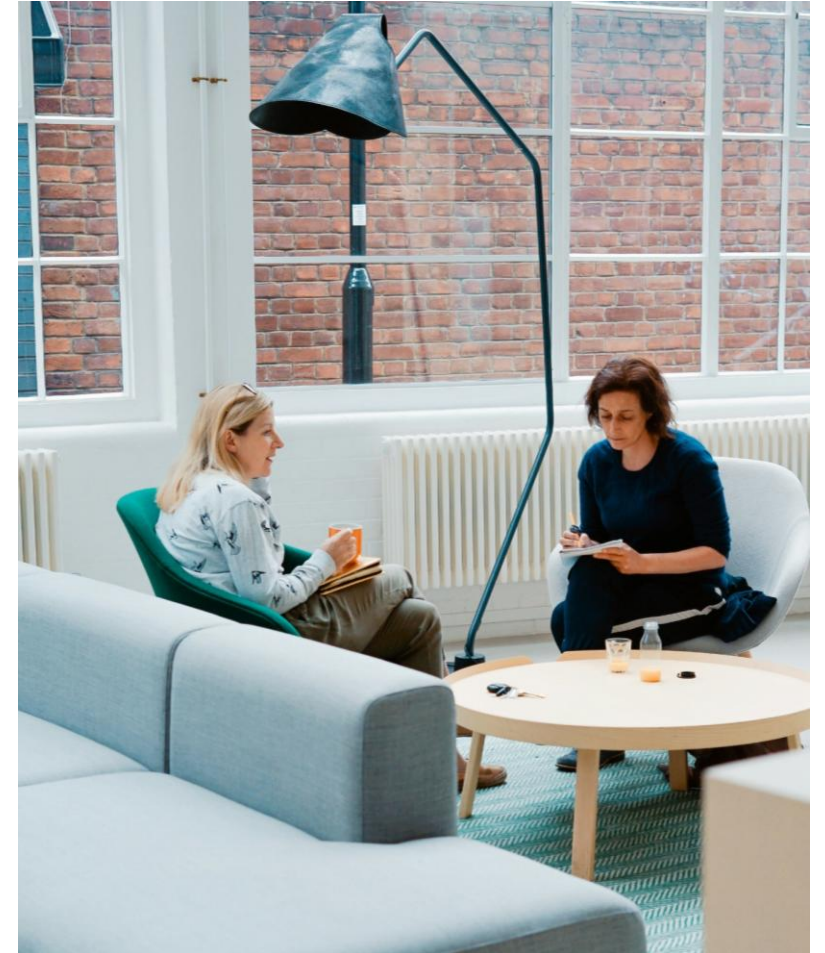
Interviews and Surveys





Interviews

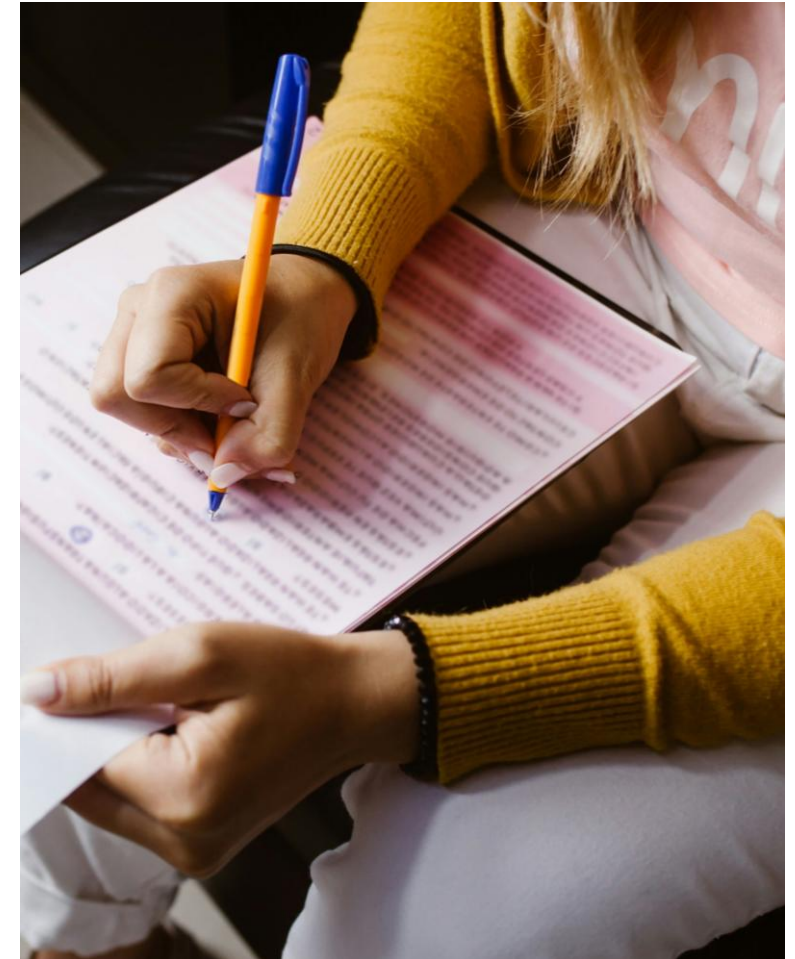
Strengths	Limitations
Rich data to understand lived experiences-why & how	Time to interview and analyze data
Allows for the unexpected/unplanned	Must wrestle with the unexpected/unplanned
Approach/theory can emerge as you go	May not be prepared for new approach/theory
Transferable to other contexts	Not generalizable to all contexts
Can learn much from the relationship	Skill to build trusting relationships





Surveys

Strengths	Limitations
Can compare many types of people and contexts-who & what	May not capture richness of people and contexts
Uses an approach familiar to leadership	Lack of flexibility re: new directions once started
Is generally fast-collection and analysis	Easy to design a survey badly
Generalizable to a population	Difficult to get the needed numbers
Anonymity can encourage more sharing	Anonymity can also discourage rich sharing





Activity 2: Weighing Strengths & Limitations





Interview Protocol Design



What Is a Research Interview?

What it is:

- **Kvale's conversation with a purpose, approach, and technique**

*"The research interview is an inter-view where knowledge is constructed in the interaction between interviewer and the interviewee."*²

Two metaphors:

- **Miner:** extracts pre-existing facts from the participant
- **Traveler:** co-constructs knowledge through the conversation

When to use interviews:

- **Meaning:** how people understand events and situations
- **Experience:** lived, felt, subjective
- **Process:** how things unfold over time
- **Context, variation, unexpected issues**

Interviews vs. surveys:

- **Interviews:** "how," "why," "what was that like?"
- **Surveys:** "how many," "how often," "to what extent?"
- *Neither is better - **the research question decides***



Building the Protocol

Protocol structure

- **Opening:** brief intro, consent, and an easy first question
- **Transition:** orient the participant to the topic
- **Core questions:** aligned directly with the research question(s)
- **Probes and follow-ups:** planned and spontaneous
- **Closing:** ask what you missed and invite final reflections
- **Debrief and thank you:** summary and end

Probes and follow-ups

- “Can you tell me more about that?”
- “What do you mean by that?”
- “Can you give me an example?”
- “What happened next?”
- “Was that typical or unusual?”

A good protocol guides the conversation, but it does not script it.



Considering the Questions

Best Practice	Problematic Example	Better Example
Ask one thing at a time	How did training and supervision affect your confidence and stress?	How, if at all, did training shape your confidence? How, if at all, did supervision affect your stress?
Use open-ended wording	Did you like the feedback process?	What was your experience of the feedback process?
Avoid leading questions	What barriers made the curriculum frustrating?	What challenges, if any, did you encounter with the curriculum?
Ask for concrete experience	What do residents think about feedback?	Can you walk me through a recent time when you gave or received feedback?
Use plain language	How do sociocultural factors mediate your perception?	What aspects of your setting or background shaped how you experienced this?



Conducting High-Quality Interviews

In the room

- Build rapport and set a psychologically safe tone
- Listen more than you talk; follow the participant's logic
- Use probes flexibly rather than reading every question verbatim
- Record, take brief notes, and write a short memo right after

Quality checks

- Pilot test the guide and revise awkward or leading questions
- Be reflexive about your role, assumptions, and prompts
- Keep the interview approach consistent across participants
- Match the protocol and analysis plan to the study purpose

Interviews are strongest when question design, interviewer stance, and analytic plan all align.



Making Decisions

Design

- Individual interview or focus group?
- In person, phone, or Zoom?
- Structured, semi-structured, or unstructured?
- How long? Will you audio-record?
- Incentives and reciprocity?

People

- Who conducts the interview? What training?
- Insider or outsider to the community, and does it matter for your study?
- How many interviews will be enough?
- If multiple interviewers: how will you calibrate across the team?

Interviews are strongest when question design, interviewer stance, and analytic plan all align.



Questions and Probes in Practice



Sample Questions

- *How did you come to live here?*
- *What do you like or dislike about living here? In this community?*
- *How would you describe your neighborhood?*

Probe: *What makes it feel that way?*

Probe: *Can you tell me more about that?*

Good interviews are not just about asking questions. They are about listening well enough to know what to ask next.



Activity 3: Draft Your Interview Questions





Survey Design



Survey Design²⁻³



- Ground it in *your* goals, research question(s) and conceptual/theoretical framework



Survey Design



- Start with the literature: does a similar instrument **exist** already?
- If not, what **constructs** from the literature will you be basing it on?
- Consider **interviews** or **focus groups** with population of interest: what do they think?
- **Synthesize** literature and qualitative data: what is the focus?



Survey Design



- Develop the **items**
- Consider the **layout**
- Consider the **length**: do you need all those questions?



Consider the Items³⁻⁴

Best Practice	Problematic Example	Better Example
Avoid “double-barreled” items	How effective were the didactics and simulation?	How effective were the didactics? How effective was the simulation?
Positively word items	How frequently were you not able to complete your modules?	In an average week, how many times did you complete the modules?
Use questions, not statements	I feel I can do well in this course (not at all true → completely true)	How confident are you that you can do well in this course? (not at all confident → completely confident)
Use enough response options	<ul style="list-style-type: none">• Yes• No	<ul style="list-style-type: none">• Not at all• Slightly• Moderately• Quite• Extremely
Organize items intentionally	Start with: “How many times have you had to remediate?”	Start with: “Which of the following describe your study strategies?”



Consider Layout³

- Label *all* response options
- Use *only* verbal labels (no numbers)
- Equally space response options
- Visually separate “n/a” or other non-substantive responses

How satisfied are you with the quality of the library services?



not at all
satisfied



slightly
satisfied



moderately
satisfied



quite
satisfied



extremely
satisfied



not
applicable



Survey Design³



- Expert validation for *content validity*
- Cognitive interviewing for *response process validity*
- Pilot testing for *internal structure and relationships with other variables*



Write Your Own! Don't Forget:

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Time to Work: Interview Protocol or Survey





References

1. Maxwell, J. A. (2013). *Qualitative research design: An interactive approach* (3rd ed.). Sage.
2. Kvale, S. (2007). *Doing interviews*. SAGE Publications, Ltd.
3. Artino, A. R., Jr., La Rochelle, J. S., Dezee, K. J., & Gehlbach, H. (2014). Developing questionnaires for educational research: AMEE Guide No. 87. *Medical Teacher*, 36(6), 463–474.
4. Hill, J., Ogle, K., Santen, S. A., Gottlieb, M., & Artino, A. R., Jr. (2022). Educator's blueprint: A how-to guide for survey design. *AEM Education and Training*, 6(4), e10796.