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Abstract

The increased utilization of qualitative methodologies as part of mixed-method health and social science research has highlighted the need for training procedures for every stage of qualitative data collection and analysis. Yet, few group training models exist for collecting reliable, valid qualitative interview data. This article presents a multi-stage, collaborative interview training process for a large team of research assistants. The training program combines insights and techniques used in both structured and semi-structured interviewing. It also includes ongoing instruction and feedback prior to and during data collection in an effort to ensure consistency and reliability. In the article, I describe each stage of the training program in detail, review some of the challenges encountered during implementation, and conclude with a discussion of how researchers and course instructors might adapt the methods to fit their particular needs.

Keywords

Interviewer Training, Qualitative Data Collection, Reliability, Validity

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On the Same Page: A Formal Process for Training Multiple Interviewers

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The increased utilization of qualitative methodologies as part of mixed-method health and social science research has highlighted the need for training procedures for every stage of qualitative data collection and analysis. Yet, few group training models exist for collecting reliable, valid qualitative interview data. This article presents a multi-stage, collaborative interview training process for a large team of research assistants. The training program combines insights and techniques used in both structured and semi-structured interviewing. It also includes ongoing instruction and feedback prior to and during data collection in an effort to ensure consistency and reliability. In the article, I describe each stage of the training program in detail, review some of the challenges encountered during implementation, and conclude with a discussion of how researchers and course instructors might adapt the methods to fit their particular needs. *Keywords: Interviewer Training, Qualitative Data Collection, Reliability, Validity*

Introduction

There is a growing demand for methods to train teams of qualitative research assistants as the number of large scale qualitative and/or mixed-methods social science research studies proliferates in response to funding priorities and empirical questions (Creswell, 2010; Maxwell, 2016; Paluck, 2010; Smalls, 2011; Teddlie & Tashakkori, 2009). The literature on teaching qualitative interviewing in context of the classroom (Eisenhardt & Jurow, 2013; Hurworth, 2008; Lather, 2006; Roulston, deMarrais, & Lewis, 2003) and preparing qualitative researchers to conduct their own studies using interview methodologies (Denzin & Lincoln, 2005; Gubrium & Holstein, 2002; Kvale, 1996; Rubin & Rubin, 2005; Weiss, 1994) is plentiful. By contrast, there is relatively little written about how to train multiple researchers to conduct interviews with a large sample of participants using a standardized protocol. A formal training process can help to improve the reliability interview data, which is determined in large part by the skill of the interviewers.

Training a group of individuals to carry out a uniform qualitative methodological procedure using a standardized instrument requires something different from what is needed to prepare individual students or research assistants to conduct qualitative interviews. This article presents a step-by-step method used to train a team of multiple interviewers to conduct semi-structured interviews with 120 eighth grade students and 75 of their parents about high school choice in New York City using a standardized protocol that allowed for unscripted follow up questions and probing. The method combines insights from and techniques used to conduct effective structured interviews (Weiss, 1994) and semi-structured interviews (Kvale, 1996; Rubin & Rubin, 2005; Seidman, 2005; Warren, 2002). It includes ongoing, iterative training and feedback in an effort to ensure consistency and reliability across researchers.

How Training a Team Differs from Teaching a Qualitative Interviewing Course

Questions about how to prepare students and research assistants to engage in rigorous qualitative data collection are not new (see Eisenhardt & Jurow, 2013; Lather, 2006; Roulston et al., 2003 for example). Yet, the existing scholarship provides minimal guidance on how to effectively prepare a group of research assistants to use a standardized protocol to conduct semi-structured interviews with a diverse sample of participants. There are some key distinctions between providing instruction to students in a class or training individual research assistants on a project and preparing a team of novice interviewers to collect data for a single study.

First, unlike in many classroom experiences where students generally explore issues and collect qualitative data on questions directly related to their own research interests, larger teams may be more likely to include people with less knowledge of the research topic at the outset. In the case of the project for which this training was developed, the research assistants had a negligible role in conceptualizing or designing the study or the original instruments. Second, few existing publications on the topic of training qualitative research teams address the complex needs of a large-scale project that may require a highly routinized system of training and skill verification such as multiple research sites, multiple languages and a compressed time frame (see Boutain & Hitti, 2006 for one example for training five research assistants (RA's) from the health sector). Our project also necessitated formal mechanisms for ongoing communication between research assistants and principal investigators (PI's) and among the research assistants themselves while in the field to ensure information-sharing, timely dissemination of revisions to interview protocols and overall consistency.

The increased utilization of qualitative methodologies as part of medical and social science experimental studies has brought renewed focus to training procedures for every stage of qualitative data collection and analysis. Researchers have worked to develop replicable methods to test and report the level of consistency of multiple researchers' coded qualitative data such as MacPhail, Khoza, Abler, and Ranganathan's (2016) procedure to calculate inter-coder reliability (ICR) among multiple coders. However, fewer examples of large group training models exist for collecting reliable, valid interview data. Whereas qualitative data analytic software now has built-in functionalities that make it easier to calculate the rate of inter-rater agreement, it is much more difficult to automate assessments of interviewer quality and reliability at the data collection stage. This article therefore seeks to contribute to the emergent body of work on training and evaluating teams of qualitative researchers from data collection through analysis by presenting a multi-stage, collaborative interview training process for a large, diverse team of research assistants.

The Research Project

The training process described in this article was developed to prepare research assistants to carry out interviews with middle school students and parents as part of a multi-method experimental study of school choice informational tools. As one of the lead qualitative researchers on the project, I was responsible for designing and implementing a training system for the research assistants who would be collecting some of the qualitative data for the study. Having taught graduate-level courses in qualitative research design and methodology, I had prior experience providing research training to students; yet, this was the first time I had prepared student researchers to collect data on a single project for my own research purposes. The topic of school choice in New York City was not new to me, however, since some of my earlier work had focused on immigrant families' school choice experiences in New York City (Sattin-Bajaj, 2014, 2015).

Context of the Study

In New York City, all rising freshmen are required to participate in a school choice process to receive a high school assignment. The admissions process is complex, with school programs varying in screening method (selective to non-selective), curricular themes, and admissions preferences. The interviews for which this training procedure was developed comprised a central component of a larger study testing a series of informational tools designed to help low-income students at all achievement levels make more informed high school choices.[1] The interviews were designed to answer research questions about the mechanisms that produce variation in responsiveness to the different tools and heterogeneity in responsiveness across different types of students. Our research team[2] recruited a stratified random sample of students from four middle schools to participate in interviews that took place at the school. The parent interview sample was composed of 75 parents of the 119 student interview participants distributed across the four middle schools.

Two of the principal investigators developed standardized interview protocols for parent and student interviews, making minor modifications to each protocol based on which informational intervention the students had received, if any.[3] Student interviews were conducted in English and in Spanish (depending on the student's language preference) in locations ranging from the school counselor's office and empty classrooms to school libraries, cafeterias, and auditoriums. Student interviews focused on the resources students used to research schools, the information they sought, how they made school choices, and how the informational tools influenced their knowledge, priorities, decision-making process, and choices. Parent interviews explored parents' understanding and use of the informational tools in the high school search process and how, if at all, it influenced their or their children's school selections. A larger proportion of parent interviews (62%) than student interviews (17%) were conducted in Spanish due to participants' language preferences.

Research Team

Members of our 12-person team of research assistants were recruited from a larger pool of 47 advanced undergraduate and graduate-level research assistants who delivered a 40-minute scripted lesson that presented the informational tool as part of the larger intervention study. We selected RAs based on having observed their strong interpersonal skills interacting with our office staff, school personnel, and middle school students in the course of classroom delivery of the intervention. We did not restrict our recruitment to RAs who had previously been trained in interviewing; rather, we prioritized finding research assistants who reflected the population of students and parents in our interview sample in terms of racial/ethnic background and languages spoken. Therefore, we recruited predominantly Latino/a and Black research assistants and prioritized hiring native Spanish-speakers given the large number of Spanish-speaking parents and students in our sample. Our final team comprised mostly graduate-level students who varied in terms of age (from early 20's to early 30's), education level (undergraduate senior through doctoral level), experience with qualitative interviewing (no

[1] For more information about the complete study, see http://www.nychighschooladmissionstudy.com/

[2] The randomized experiment was led by a team of four researchers and supported by a staff and research assistants. In the article, I used the first person plural when describing any decisions made or actions undertaken by the leadership team. I used the first person singular to discuss any of the decisions or activities related to the training method that I led alone.

[3] Since randomization occurred at the school level all students in a middle school received the same treatment (or control).

training to doctoral-level qualitative research coursework), time spent in primary and secondary school classrooms, and familiarity with the education system in New York City.

Considerations Underlying the Qualitative Training Process

The training process was designed with the intention of sequentially building research assistants' knowledge base and skills first through readings, then through practice and self-assessment, and, finally, through receipt of personalized feedback on their interview techniques. The ultimate goal was to prepare a corps of skilled interviewers to use an identical protocol to conduct interviews that would yield reliable, valid data.

In the context of this project, I understood validity to be a measure of the extent to which the questions asked during the interviews were effectively phrased and fully understood by the interview participants. In other words, validity was determined by the success of the interviewers, via the use of our protocol and unscripted follow-up questions, to get at those aspects of students' and parents' high school choice experiences in which we are most interested. In essence, I wanted to ensure that our research team collected the data we needed in order to be able to make inferences about variation in students' and parents' behaviors, perceptions, and utilization of our informational tools. To that end, the RA's were asked to conduct multiple pilot interviews using draft protocols, and I revised the protocols based on interview participants' responses indicating evidence of confusion, misunderstanding or ineffective questions.

To ensure reliability, I held group training sessions and reviewed practice interviews multiple times in order to confirm that interviews were being conducted in a similar manner. I shared exemplary audio excerpts of practice interviews with the full group of trainees to highlight successful interviewing techniques and use of the interview protocol, and I provided clear written instructions on the structured interview protocol document to eliminate potential misunderstanding. Ultimately, I sought a high degree of standardization among interviewers to be confident that different interviewers would produce similar transcripts if they interviewed the same person.

The training began by working with RA's to develop the essential skills of a good interviewer: establishing a positive rapport, active listening, responsiveness to the interviewee, and for more structured interviews, consistently following the scripted protocol (Roulston et al., 2003; Rubin & Rubin, 2005). Next, research assistants were required to engage in self-reflection and auto-evaluation exercises to become familiar with their own strengths and weaknesses as interviewers, including noting verbal patterns and unintentional, disruptive conversational habits (Lather, 2006; Lincoln & Guba, 1985). The training process emphasized the collective nature of the larger endeavor (interviewing 190 subjects), and I instituted regular research team meetings. These meetings functioned to promote a continual exchange of ideas, suggestions, and questions about the interview protocol. I also addressed strategies to improve interviews and to engage reticent student (or parent) interview participants and created a forum for discussion of emerging themes and hypotheses from the field. Ultimately, with the training and team-building activities, I sought to establish a flexible, iterative process that simultaneously allowed for individual skill building and standardization to produce a set of detailed narratives from students and parents about high school choice in New York City. Table 1 below summarizes the four stages of the training process and the readings and activities comprising each stage.

Table 1: Stages of interview training process

Training Stage	Time Frame	Reading/ Practice	Listening	Writing	Meetings
Stage 1 Introduction	Weeks 1 + 2	Rubin, H. J. and Rubin, I. S. (2005), Chapters 7-8. Weiss, R. (1994).	Three 8-12-minute excerpts of student interviews conducted by the PI	Memo evaluating effectiveness of interviews and specific techniques employed by interviewer	• Review semi-structured interviewing techniques • Discuss effective and ineffective strategies used in sample interviews • Introduce and practice draft student interview protocol
Stage 2 Practice	Weeks 3 + 4	Schedule and conduct practice interview with middle school students using draft protocol	Listen to entire recording of practice interview	Memo about experience of conducting interviews; identify specific interview strategies employed and challenges; provide feedback on interview protocol	• Discuss interview experience • Identify successes, challenges, issues and responses • Discuss how to address challenges (e.g., unresponsive participant) • Detailed review of interview protocol to solicit revisions
Training Stage	**Time Frame**	**Individual Feedback**	**Formal Communication Procedures**	**Informal Communication and Support**	**Meetings**
Stage 3 Standardization	Week 5		PI listens to each interview recording and provides memo to RA with feedback: • Identify areas for improvement • Note examples of effective interviewing techniques utilized	Summary of common interviewing errors and things to remember: • Methods to engage the interview participant; • Effective use of protocol and unscripted follow-up questions • Interviewer habits to avoid	• Review common feedback • Listen to excerpts from RA practice interviews that demonstrate effective techniques • Review draft parent interview protocol • Summarize function of student/parent interviews in context of larger study
Stage 4 Communication and Support in the Field	Week 6-20	[Weeks 6-7] PI listens to interview recording from each RA and provides written or in-person feedback on: • Adherence to protocol • Probing and follow-up • Flow and richness of interview [Weeks 8-20] PIs listen to 2-3 randomly selected interviews each week for quality control	• RA submits online field report form after each interview • RA submits weekly memo with insights from the field and questions/concerns • PI sends weekly group email with summary of main themes; challenges from the field; and changes to protocol	• Project manager available on- demand for issues in the field • PI available via text, phone and email for methods questions • Weekly PI phone calls to 2-3 randomly selected RAs to discuss field experiences	Group meetings every weeks to: • Review minor updates to the interview protocols • Discuss RA's best practices to effectively engage students • Respond to common questions, challenges or concerns in the field

Stage 1: Reading and Listening

The first stage of training combined reading assignments and a listening exercise. After orienting the team of RA's to the goals and purpose of the interview study, they read two chapters on conducting interviews from Rubin and Rubin's (2005) book and a brief guide to structured interviewing excerpted from Weiss (1994). Then, they listened to 8-12-minute segments of three interviews that I had previously conducted with NYC students about their high school choice experiences. The three interviews were purposefully selected due to their variation in terms of the participants' ease and responsiveness with the interview process, my effectiveness in employing unscripted follow-up questions and probes, and the overall depth and detail achieved in the interview. Research assistants were given a copy of the semi-structured interview protocol guiding the three interviews and were asked to write a short response memo after listening to the recording that addressed the following questions: (1) Which interview questions worked well? (2) Which techniques did the interviewer use to elicit more detailed information from the interview participant? (3) How did the interviewer respond when the participant gave a limited response? (4) What could have been improved in the interview? and 5) What other questions would you have asked?

Each stage of the training concluded with an in-person team meeting to discuss the RA's reactions to the activities and readings, address remaining questions or sources of confusion, and to introduce the next phase of the process. The group session after stage one began with a review of the basic techniques for conducting successful structured interviews. I emphasized the importance of waiting for the participant to respond to questions and avoiding interjecting or offering language for the participant to use in his/her responses. These were two of the habits that I (and other instructors of qualitative research, see Roulston et al., 2003) have frequently encountered among students in my introductory qualitative interviewing courses and therefore sought to draw attention to them at the outset.

Next, as a group we discussed the sample interviews they had listened to and identified the more and less successful aspects of my approach in each. I then presented a draft of the interview protocol to be used for student interviews in the current study. RA's read each interview question aloud, and I explained what we were trying to learn from it. I also solicited feedback and suggestions about students' potential (mis)interpretation of the language used. This exercise was particularly fruitful given the diversity of the RA's experiences working in classrooms and with middle school students, both as part of and separate from the study. The research team included former middle school teachers as well as teachers in training, and their knowledge of youth language resulted in valuable revisions.[4]

The meeting ended with instructions for stage two of the training process: conducting a practice student interview using the protocol. I sought to leave RA's with a clear understanding of our goals for the ultimate outcome of each student and parent interview. As such, I explained that after conducting an interview, a researcher should have elicited sufficient detail and should have listened closely enough in the course of the interview to be able to compose a two to three paragraph descriptive summary of the student's experiences participating in high school choice in New York City. Specifically, the interviewer should be able to elaborate upon the following three elements: (1) the student's main sources of information (about the choice process and the specific high schools available); (2) the student's familiarity with the high schools that appeared on his/her final application (a copy of which would be provided in the interview), and (3) the student's familiarity with, usage of, and overall response to the informational interventions we provided. During the actual data collection

[4] For example, some questions used the term "school qualities" of interest, and multiple RA's suggested we change to more simple language that asks what students "were looking for" in a school.

phase of the study, this summary exercise was formalized through the use of an online post-interview field notes form, but several research assistants commented on the usefulness of conceptualizing the immediate goal of the interview in terms of this summary.

Stage 2: Practice Interviews and Self-Assessment

The second stage of the training process moved to active learning about interviewing through direct experience. Each research assistant was responsible for conducting a practice interview (in English or Spanish) with student volunteers from a middle school that had participated in the intervention study (RA's were also responsible for coordinating the logistical aspects of the practice interview such as scheduling it with the students, finding a place to conduct the interview). After completing the interview, research assistants listened to the recording and wrote a response memo in which they reacted to the interviewing experience overall and addressed the following specific aspects of the interview: (1) what they did well as an interviewer; (2) what they did not do well as an interviewer; (3) which questions worked best; (4) which questions were less successful; (5) at which points in the interview could there have been more follow-up questions or probing; (6) which interviewing techniques and strategies they used effectively; (7) what the interviewer might think about doing differently in subsequent interviews; and (8) questions or concerns about the interviewing process and suggestions for revisions to the protocol.

In the second team meeting, which was convened prior to me having listened to and evaluated the RA's practice interviews, research assistants were asked to discuss their reactions to conducting the pilot interviews and to share examples of what they thought went well and didn't go well in their interviews. They also described unexpected events or responses and exchanged ideas about how they might approach future interviews differently. Multiple research assistants cited challenges with students providing one-word answers, demonstrating discomfort with being asked so many questions, and showing an overall sense of boredom or disengagement with the interview process. Others also identified specific questions in the protocol that students found confusing or had difficulty answering, and a number of RA's expressed concern about asking questions out of order. Nearly all research assistants reported on techniques they used to try to put the student at ease such as discussing interests outside of school, music or non-academic topics prior to starting the interview. They also universally expressed surprise about how much more demanding the actual interview was than what they had anticipated.

The discussion about practice interviewing experiences led naturally to a conversation about additional revisions to the interview protocol. Given the extent of student interviewees' confusion with a number of the interview questions, I systematically solicited feedback from the RA's on each question one at a time and discussed alternate ways of phrasing or ordering questions. RA's were advised that the final protocol would be distributed at the next team meeting to take place after individual feedback on interviews had been provided.

Stage 3: Expert Feedback and Group Standardization

In the third stage of training, I listened to each sample interview recording while reading the accompanying memo prepared by the RA, and I wrote a lengthy, personalized feedback memo in response. When listening to the interviews, I focused on the interviewer's tone of voice, pacing, adherence to the protocol, content and frequency of probes; and unscripted follow-up questions asked. I also noted strategies used to engage the interview participant and instances where the interviewer offered opinions or endorsements of responses or missed opportunities for further questioning. The feedback memo identified at a minimum, two examples of effective interviewing techniques that the RA had used. However, I concentrated more heavily on discussing areas for improvement. For example, in one response memo, I noted multiple instances where the RA had successfully probed to elicit additional detail, and in the feedback document I included the time and the exact wording utilized: "Min 5:03 Good probing on borough fair questions: 'When you went to those schools what did you do? What told you that they were really good schools?'" I would then point out other places in the interview where she could have probed further to get more concrete information and I would provide suggested language that could have been used in such a probe: "She said she looked at graduation rates—where did she find this? What was the graduation rate she was looking for?"

While the strengths and weaknesses of each interviewer varied (e.g., some research assistants were more successful at establishing rapport with the student while others were better at probing to get a more complete story), by and large, the focal points for feedback fell into four main categories: (1) methods to engage the interview participant; (2) fidelity to the interview protocol; (3) effective use of unscripted questions; and (4) awareness of undesirable interviewer habits. Therefore, in addition to sending each research assistant his/her individualized feedback form, I prepared a summary document of general interviewing tips and distributed it among the research team. To address issues related to establishing rapport, I included examples of suggested language to show active listening on the part of the interviewer (e.g., "Can you say more about that?" "Can you give me an example of a time that happened?"). The document also included instructions to interviewers to give students adequate time to respond to the questions and recommendations that RA's describe the interview to students as a "conversation" to reduce perceptions of formality or feeling pressure to "perform" well.

Practice interviews revealed research assistants' need for additional guidance on how to simultaneously follow the protocol and incorporate unscripted follow-up questions and probes. The summary feedback memo explicitly stated the requirement to ask every question on the protocol while recognizing the possibility that the order of questions might not be identical in every interview. I addressed this by providing suggestions about how to respond when the flow of the interview resulted in having to "skip around" in a way that would avoid being repetitive:

> Try to follow the order of the questions on the protocol. But, if in the course of answering one question the interviewee answers another one too you don't have to repeat or cut him/her off. Or, if he/she didn't fully answer the family question, just modify it later when you get to it so you get the full picture. It's good to say things like, "I know we already talked about this a little bit earlier but I want to ask a little more about your family..."

The final section of the document identified and offered remedies to a range of verbal habits or patterns of speech that could potentially disrupt the natural flow of the interview or, worse, inadvertently influence the interviewee's response (Rubin & Rubin, 2005). In brief, I emphasized the importance of being judicious about the amount and type of personal information the interviewer shares with the interviewee while also facilitating an interpersonal connection that would allow for a successful interview. For example, research assistants were instructed not to discuss their role in the delivery of the school choice informational tools unless specifically asked by student interviewees so that students might be more likely to provide the most honest assessment of the tool's utility and their usage of it. The document also included a reminder about how to elicit details and encourage respondents to continue talking without appearing to endorse the actual content of the response (e.g., asking, "Could you give me an example of when that happened?"). Last, I brought attention to one of the most common undesirable habits of novice interviewers: paraphrasing a subject's response using words other than what he/she originally said (Collins, Given, Given, & King, 1988; Roulston et al., 2003). The final item on the list labeled, “Don’t put words in their mouths” exhorted research assistants to be cognizant of their natural tendency to summarize an answer before proceeding to the next question. While repeating a response can in fact be a useful strategy to confirm understanding or get clarification, research assistants were instructed to mimic the interviewee’s language rather than insert new phrases of their own.

After sharing the individual and group feedback memos, I held one final team training meeting to review the goals of the project, finalize and discuss changes to the interview protocol, and provide additional examples of effective interviewing in the context of this study as a means to improve standardization. I selected excerpts from four RA practice interviews to illustrate some of the preferred interviewing skills and techniques. As a group, we listened to each interview recording excerpt and discussed the strategies that the interviewer had effectively employed. The interviews highlighted (1) establishing rapport with reticent participants; (2) active listening without endorsing responses; (3) adhering to the protocol with flexibility in sequencing of questions, and (4) effective use of probing and follow-up questions to get depth and detail.

Next, I distributed a final version of the student interview protocol, and once again, we went through it question by question to ensure that research assistants understood the rationale for the order, the language choice and the purpose of each question. Then, we reviewed a draft of the parent interview protocol, which select RA’s would use in practice parent interviews as part of a larger process to develop a validated parent interview protocol. To close the meeting, I reiterated the goals of the student interviews as helping us develop a detailed understanding of students’ experiences participating in high school choice in New York City by “walking a day in their shoes.”

This meeting concluded the pre-interview training process for those research assistants who, based on their practice interviews and ongoing informal evaluations of interpersonal skills, had demonstrated sufficient competence in interviewing to proceed. The single RA whom I determined needed additional practice conducted another interview with a student from the sample middle school. In fact, all research assistants were invited to conduct another trial interview if they wanted additional practice, and three RA’s opted to do so. The project manager, under my supervision, conducted a similar process of expert review and feedback to evaluate the research assistant who required more practice. After the second interview, she was approved to proceed with data collection.

Stage Four: Ongoing Support, Feedback and Communication in the Field

The transition from formal interview training to provision of ongoing logistical, technical, and methodological support during data collection required a new set of communication systems and procedures. These procedures were motivated by the desire to maintain contact with RA’s in the field, respond to unforeseen challenges, provide steady guidance and feedback, and ensure that consistent messages were being transmitted to all 12 RA’s conducting interviews. RA’s were required to complete an online field report form after each interview consisting of a 250-word summary of the “big picture story,” and space to record any usual or particularly interesting features of the student’s/parent’s experience, questions or concerns. Beyond this, I instituted a set of standard communication and reporting mechanisms. First, I asked each RA to write up a brief, weekly summary of challenges and insights from the field. Next, I would send one weekly email to the entire team that included a summary of the main themes, ideas, and challenges noted in the field reports and any revisions I had made to the protocol (in response to RA feedback or independent PI decisions). This weekly summary email also served as a forum to answer specific questions or issues raised and to highlight interviewing skills and strategies successfully used in difficult circumstances. For example, after the first week of data collection, some RA's noted issues with sound quality. Others expressed concern about sounding repetitive by asking all of the questions on the protocol if some had been covered earlier in the interview. That week's email included tips for way to maximize sound quality (e.g., put the recording device as close as possible to the student, move to a quieter location) and explicit instructions about how to deal with repeating questions and how much to probe if students did not remember parts of their choice experience. The following is excerpted directly from the summary email I sent after the first week of interviewing:

> NO NEED TO REPEAT QUESTIONS IF ALREADY ANSWERED
> I want to remind you that while we do want you to try to ask all of the questions on the protocol, if a student has already answered one of the questions in the course of responding to an earlier question, there is no need to ask the question again even if it appears on the protocol. Use your best judgment to determine if you have already gotten a good answer to the question or if it is worthwhile to ask again. We want to avoid repeating questions and having the interview go long just because we have to ask more questions. Students tend to disengage around the 30-minute mark, so take cues from the student and ask again only if you really feel like you haven't heard something.
>
> PARTICIPANTS NOT REMEMBERING: HOW MUCH TO PROBE
> It is highly likely that some students might not remember things or might not have answers to all of the questions you ask. This is ok and to be expected. If a student doesn't have an answer, you should, of course, try to probe gently at first. But, be attentive to what is happening, and if it is obvious that the student has no answer or doesn't want to answer, move on. We don't want your additional probes to feed the students answers that don't really come from him/her or for the student to say anything just to shut you up! Again, you are the best judge to determine when it makes sense to probe and when to move on.
>
> It would be good to establish up front, during the introductory comments, that it is ok if a student doesn't have answers to all of the questions. You might say something like, "You might not have answers to every question I ask, and that's perfectly ok. I might ask some follow up questions to see if I can jog your memory but do not worry if you don't answer some questions." Then, if during the interview there's an instance when the student doesn't have an answer you can remind him/her, "Like I said at the beginning, no big deal if you don't have an answer. We can go on to the next question."

In addition to the weekly reports from RA's and the summary email, I distributed my cell phone number and encouraged RA's to contact me, or any member of the project staff, if they had questions, concerns or ideas to share at any point. Each week, I called two or three randomly selected research assistants to talk about their experiences in the field and what they were learning. Two weeks after the start of data collection, I convened another group meeting to share student engagement strategies, troubleshoot any challenges in the field, and check on standardization in interviewing techniques across research assistants. The meeting addressed minor updates I had made to the protocol, solicited feedback from the RA's about how to effectively engage students at the start of the interview, and dedicated much of the time to responding to common inquiries raised by multiple RA's. These included questions about when to probe or follow-up versus moving on with the interview questions, how to respond to students who repeatedly say, "I don't know," and what kind of language to use for successful probing. As research assistants began to conduct more parent interviews, I focused more on questions related to the parent interview protocol, parent interviewing techniques, and other logistical and technical issues associated with parent interviews (e.g., where to conduct interviews, how to get in contact with busy parents). The process of weekly reports, emails, individual telephone conversations, and periodic team meetings continued through late April 2016 when we reached our goal of 119 student and 75 parent interviews.

Challenges in the Field

The process of training a diverse corps of research assistants highlighted a set of key challenges that inevitably accompany an endeavor of this scale. To start, it was difficult to balance the goals of strict adherence to a standardized interview protocol and incorporating unscripted follow-up questions and probes to capture nuance and detail when conducting a large number of interviews. Initially, I instructed research assistants to prioritize closely following the protocol to ensure consistency across interviews; as interviewers gained more familiarity with the protocol and with the range of interviewees' responses and experiences, I encouraged them to introduce follow-up questions or probes when opportunities to glean relevant details presented themselves.

Moving from an exclusively standardized interviewing approach to one that incorporated semi-structured interviewing techniques produced richer narrative accounts, but also presented a new set of challenges. Knowing when and how to employ follow-up questions and probes demands an additional set of skills, and research assistants had to work to hone these. Consequently, multiple RA's reported a sense of confusion about how to determine when a response of "I don't know" is truthful and not just a participant's boredom or desire to transition to a new question. In other words, understanding when to continue probing for details and when to move on emerged as another topic to address as a large group.

Any training process is only as good as the work product that results, which, in this case, is the quality of the interview data. As to be expected, research assistants demonstrated variation in their effectiveness in successfully using unscripted follow up questions and probes in their student and parent interviews. The same was true of their capacity to establish rapport with their subjects and to conduct interviews generally. We evaluated the validity and reliability of the interview data, and, through them, assessed the efficacy of the training process in multiple ways. Initially, the other principal investigator with qualitative research experience and I, along with our project manager listened to at least two interviews conducted by each research assistant. We then provided written and/or in-person feedback about what was effective and what the interviewer should be mindful of or work to change in subsequent interviews. This allowed us to monitor the uniformity in interviewers' approaches in their use of the protocol and to correct behaviors that did not conform to the desired standard (to check and increase reliability). At the same time, we used these audio reviews to identify interview questions from the protocol that were not eliciting the responses we sought (to verify validity) and to make any necessary updates to the protocol. As data collection continued, each week we would randomly select two to three interview recordings and listen for the interviewers' adherence to the protocol and their probing techniques utilized, and to assess the overall flow and richness of the interview.

The RA meetings that took place after the start of actual data collection offer additional evidence of the strength of the training program and the structures it established to promote reliability and validity. Research assistants shared common insights and ideas about what they were learning their interviews, and these meetings also allowed people to surface puzzling or unexpected responses. As such, it provided the PI's an additional opportunity to check commonalities and differences in how RA's were conducting interviews and in the information these interviews were yielding as well as to intervene or inquire if something seemed awry.

Finally, during the course of data cleaning, coding and analyses, I have been able to confirm the consistency and quality of the interviews conducted. With data analysis currently ongoing, we do not yet have empirical findings to serve as evidence of the success of the training exercises. However, a subset of the larger team of RA's has continued to work on the study and has conducted semi-structured interviews with students, parents and school personnel utilizing the skills and strategies developed through this training process. Moreover, we have repeated the training method with new research assistants, and they have shown rapid acquisition of interviewing skills through the use of listening, practice, self-reflection and ongoing feedback.

Conclusions

Interviews are increasingly being incorporated into multi-method projects that require qualitative evidence to answer complex empirical questions (Boutain & Hitti, 2006; MacPhail et al., 2016; Smalls, 2011; Teddlie & Tashakkori, 2009). As a co-principal investigator on a large-scale study that combined experimental and qualitative methods, I was responsible for preparing twelve research assistants to conduct semi-structured interviews with 119 students and 75 parents using a standardized protocol. I sought to design a set of training activities that would build research assistants' understanding of the technical aspects of successful qualitative interviewing and promote skill-development through a carefully planned sequence of reading, practice, self-assessment, and feedback. The training process comprised four distinct phases, beginning five weeks prior to the start of actual data collection and continuing over the course of the four-month period in which interviews were being conducted.

In its entirety, the training process lasted nearly five months and required hundreds of hours of time from principal investigators, a project manager, and twelve research assistants. The number of research assistants, the diversity of their backgrounds and experience, and the size and heterogeneity of the interview sample required an extensive procedure to ensure standardization and reliability. It may be neither possible nor desirable for other researchers to engage in a process this time-consuming and expensive. However, there are key features of this training model that can be easily replicated or adapted to other projects.

To start, any training method should provide clear examples of the desired outcome early on in the process so that trainees have a concrete understanding of the end goal to which they are working. This may include recordings of interviews, interview transcripts or even a published article, book chapter or report that utilized data similar to what will be collected. Next, trainings must provide low-stakes opportunities for trainees to practice interviewing in scenarios and with participants that approximate the "real world" data collection they will eventually be doing. This means identifying interview participants with whom trainees can practice conducting interviews using the same protocol and under similar interviewing conditions. Third, ongoing self-assessment and expert feedback should be a cornerstone of all training procedures. To become a good interviewer, a person must be aware of his/her own habits, amplify those that are effective and work to reduce those that interfere with successfully engaging a participant. Assignments to listen and respond to one's own interview recordings and receipt of evaluations and feedback from external reviewers facilitate this. Finally, when working on a team in which multiple people are conducting interviews, it is important to establish formal mechanisms for group communication and exchanges. This may occur through regularly scheduled meetings, conference calls, email updates or a combination of the three. All researchers should be familiar with one another and be comfortable raising questions, sharing ideas, and soliciting suggestions about how to respond to challenges in the field. Structured channels of communication can help support this.

The training method presented in this article may also have relevance for instructors teaching undergraduate or graduate-level courses on qualitative interviewing. Some instructors already use group research projects in qualitative methods courses as a way to help students build and practice qualitative research skills (see Eisenhardt & Jurow, 2013 for one example). This training method offers additional ways to prepare students in the context of classroom instruction to carry out interview-based group research projects. In fact, the training activities related to protocol development and refinement will be particularly applicable to qualitative interviewing courses. These aspects of the training method may not be as relevant to researchers who are training assistants for their own studies.

In sum, the stages of qualitative research training elaborated in this article provide a menu of options that can be utilized as a package or individually based on the specific needs and imperatives of researchers and course instructors. This model seeks to advance the ongoing interdisciplinary conversations among researchers, educators and students about ways to develop collaborative teams of qualitative researchers by offering a starting point upon which to build.

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