

## Practical Guidance in Identifying, Recruiting, and Interviewing International Key Informants in Adult Education Research

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**Abstract:** Cross-cultural qualitative research is essential to develop practical approaches to promote adult education and training in diverse societies. Yet, little systematic guidance is available to successfully conduct a large-scale cross-national qualitative inquiry in general, and in virtual settings in particular. The purpose of this study is to identify challenges and effective strategies in virtual qualitative interviews with international key informants. We used a focus group of five researchers to identify challenges and strategies associated with five key domains of qualitative interviews with informants: identification, recruitment, preparation, conducting interview, and follow-up. Deductive thematic analytic methods and content analysis revealed nuanced tactics related to challenges and strategies. These findings provide practical guidelines for adult education researchers conducting interviews with international key informants.

*Keywords:* key informant interviews, adult learning, programs and policies, virtual interviews

Lifelong learning and skill upgrading over the life course is needed to ensure adults have the skills desired in the current global labor market. Job automation, advanced technologies, and demographic changes (e.g., longevity) require the availability and accessibility of educational programs for the workforce to remain competitive in a national as well as global economy (Desjardins & Rubenson, 2013; OECD, 2017; OECD, 2019). There is little cross-cultural research regarding lifelong learning and workforce education policies implemented across nations. This gap in understanding represents an important barrier to developing culturally sensitive lifelong education policies and programs.

### Background

The research discussed here is part of a larger mixed methods study that sought to gain a better understanding of associations among skill proficiencies (i.e., literacy, numeracy, and problem solving skills), lifelong learning, and employment among adults in the US and selected Organisation of Economic Cooperation and Development (OECD) member countries. For the qualitative portion of the research, 60 key informants in 11 countries were interviewed to gain a better understanding of policies and programs intended to facilitate opportunities for adult learning. The purpose of this study is to provide practical guidelines by identifying and

summarizing challenges and effective strategies in interviewing international informants on lifelong learning policies.

### **Methodology**

We used purposive sampling to recruit five researchers who were involved with our mixed-methods international research of adult educational and training (AET) opportunities. Only researchers involved with qualitative interviews of international key informants, hereafter KIs, were invited to participate in a virtual focus group. The participants were all female between the ages of 25 and 67. The study participants had 4-to-15 years of research experience. All participants had completed graduate-level research training, and two were pursuing doctoral degrees at the time of the research project. We distinguish researchers who were a part of the focus group by referring to them as *participants* or *focus group participants* from individuals interviewed for the qualitative portion of the mixed methods research by calling them *key informants*, *KIs*, or *interviewees*.

Based on the interviews with 60 KIs, which took place between November 2018 and June 2020, we focused on five key areas of interest for preparing and conducting qualitative interviews with KIs, including: (a) identification, (b) recruitment, (c) preparation, (d) conducting interview, and (e) follow-up. Of the 60 KI interviews, 18 took place after the start of the COVID-19 pandemic in March 2020 in the US. We led a one-hour focus group in which participants were asked to explore facilitators and barriers associated with the five key areas. The focus group was audio recorded and transcribed verbatim via an online service—www.Rev.com. Transcripts were manually reviewed for accuracy.

Focus group data were imported into NVivo (QSR International, 2020), an analytic program that assists evaluation of unstructured text data. Three researchers independently applied 10 broad coding categories (see Table 1) to the transcript line by line in NVivo. This process was followed by paired review to reconcile discrepant coding.

The coded data were explored using content analysis (Elo & Kyngäs, 2008). Using NVivo, line-by-line data classified into each of the 10 broad codes (Table 1) were individually retrieved, iteratively open-coded for underlying themes, and then distilled into sub-categories. To ensure methodological rigor and establish data trustworthiness, codes and emerged themes were reviewed for accuracy by the focus group participants, and further adjustments were made according to their feedback (Krefting & Krefting, 1991). The consolidated criteria for reporting qualitative research (COREQ) (Tong, Sainsbury, & Craig, 2007) was utilized to report essential research processes.

### **Results**

Focus group participants reported several effective strategies and barriers associated with each of the five key steps: (a) identification of KIs, (b) recruitment, (c) interview preparation, (d) conducting the interview, and (e) follow-up. Below we present challenges and effective strategies in each of these five areas. Quotes were selected as exemplars, portraying the nuanced statements relating to effective strategies and challenges.

**Table 1.** *Codes, Sub-codes, and Definitions in Study*

Code	Sub-Codes	Definitions
Identification	Effective Strategy	Successful identification of KIs with relevant experience on lifelong learning and labor market policies.
	Challenge	Identification of challenges and barriers pertaining to the successful identification of KIs.
Recruitment	Effective Strategy	Successful recruitment efforts in which KI agrees to participate in the research.
	Challenge	Barriers experienced during the process of extending a formal invitation to participate.
Preparation	Effective Strategy	Successful efforts in preparing for the interview with the KIs.
	Challenge	Barriers associated with the development of an interview protocol and arranging the interview setting.
Conducting Interview	Effective Strategy	Strategies related to the successful interviewing of the KIs by the research team.
	Challenge	Unsuccessful strategies during the interview process.
Follow-up	Effective Strategy	Successful post-interview process of data organization, extraction, and resuming contact with the KIs.
	Challenge	Barriers associated with the post-interview process of data organization, extraction, and resuming contact with the KIs.

*Note:* KIs = Key informants

Regarding the first step, identification, challenges included unfamiliarity with online platforms and the expertise of KIs, while effective strategies included conducting literature reviews, utilizing an advisory board, maintaining a master list, attending professional conferences, using chain referrals, and being open to different KI expertise areas. Regarding the expertise of KIs, a researcher shared, “Sometimes people would give us names and then we would have to do due diligence to find out if they really were a good key informant. Sometimes we found they were not.” Even with those challenges, researchers shared the effectiveness of using chain referrals and being open to different areas of expertise:

I think I was surprised by some of the people that were identified, like [organization] and then [organization]. In terms of recruiting, sometimes you'll get unexpected people identified that you wouldn't even think of, and then that might cause you to also look in a different direction to recruit.

In terms of the second domain, recruitment, challenges included outdated contact information and competing circumstances, while strategies included use of email tactics (i.e., emails tailored to KI expertise, use of read receipts, and suggesting specific times for an interview), highlighting KIs' expertise in the initial email outreach, referencing professional networks, using online networking sites, and re-visiting invitations that were previously declined. Regarding the use of read receipts, researchers shared:

I think one strategy is the use of read receipt on email, so that we know whether someone has opened that email. At least that way if we are not hearing from them, we know it is

not because they are not seeing our messages, but simply because maybe they are not interested [in being interviewed].

Researchers indicated that competing priorities, impacted recruitment. In some instances, researchers simply did not have time, and early in the pandemic, individuals were still adjusting to their new work and social situations. As potential KIs adjusted to their new environments, this allowed for an opportunity:

I pulled a list of all of our key informants that had declined previously, specifically for the reason of not having enough time. . . . Although we know that our lives might be more convoluted now [during the COVID-19 pandemic], in some cases folks had a little bit more flexibility in the work and their priorities, because some things are not possible to move forward with working remotely. [Principal Investigator] drafted a message to send to several of those folks who had previously declined.

Preparation, the third step in the interview process, included challenges related to structural differences in national policies:

For certain countries, education is free. That is not necessarily that situation in all countries so we had to go in and craft the interview guide to be specific to their experience because if we did not, [the interview] would not go anywhere.

Strategies for preparation included familiarizing the research team with the KIs' work, tailoring the interview guide to the KIs, scheduling congruencies, and the flexibility of interviewing platforms (e.g., Skype, Zoom):

Every time we were getting prepared to do the interview, [researcher] would send everybody the agenda, the interview guide, and there will be always some information about the person and their work. Instead of going and looking for that person myself, just what is already been prepared by [researcher] or just look at those resources and learn more about [the KI], so you feel like you know them a little bit before the interview starts.

Scheduling congruencies were important since researchers were managing multiple time zones, including daylight savings time differences, as well as varying national holiday calendars. Researchers used online apps to manage these challenges.

For the fourth step, conducting the interview, researchers identified the setting of the interview, technical difficulties, language barriers, and the unrelated expertise of the KIs as challenges. Regarding language barriers, researchers shared, "I would say there were times when we had to rephrase the question in a different way or use different words because they weren't familiar with specific terminologies." Also, when discussing the expertise of the KIs, researchers indicated, "There were instances where . . . their work wasn't necessarily aligned [with the research]." Strategies included introducing mutual research, being flexible in interview content and format, allowing the KI to lead, sharing personal experience, adopting video conferencing (verses just telephone interviewing), limiting the length of the interview, and exchanging research. Related to both flexibility and allowing the KI to lead, researchers shared:

We did not always stick to the interview guide. We sort of let the person we were talking with, if he or she brought up a topic that really was not in the guide, we would really go with that and delve deeper into that.

The challenge in the fifth and final step, follow-up, was related to the language in the transcripts while strategies included revisiting identification (chain referrals), exchanging resources, peer debriefing, and organizing data. Researchers shared, “I had to read and reread [the transcript] several times to make sense out of it because it’s not the English used in the United States.” In terms of the strategy related to chain referrals, researchers indicated:

If [the KIs] have referred us or given us names of other individuals, that is when we start the process of going back to the identification process so that we can see is this name that they gave us really going to be a good fit for our work.

### **Discussion**

There is little research regarding differences in lifelong learning policies across multiple countries. This gap represents an important barrier to developing effective lifelong learning and in turn, workforce education policies and programs to improve adults’ employment prospects in a rapidly changing labor market. The purposes of this study were to describe lessons learned from a qualitative research project with 60 KIs from 11 countries, and to summarize challenges and effective strategies when preparing and conducting virtual interviews with international KIs.

This study is not without limitations. First, due to the specific focuses (e.g., lifelong learning, workforce education) of this study, we advise caution in generalizing these results. There is no unidimensional approach to identifying, recruiting, and conducting interviews with international key informants in virtual settings. Second, the focus group was conducted with KIs from 11 countries. The insights that emerged from the focus group data are most likely not exhaustive from sociocultural perspectives.

Our lessons learned from a unique international research project can be useful guidelines for ongoing as well as future qualitative research that involves KIs from multiple countries in virtual settings. Researchers may benefit from implementing our suggested strategies that allow flexibility in each area as well as emphasize a collaborative approach allowing space for a shift in power. We also assert the importance of efforts to mitigate challenges such as time differences, language barriers, and securing multiple web-based interviewing platforms. As a next step, future research should expand the scope of international context beyond 11 countries, and cross-examine this study’s findings from KIs’ perceptions to refine the guidelines for cross-national qualitative interviews, and to evaluate strategies to overcome barriers to participating in international virtual interviews.

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