

Stevens Initiative

Evaluating Virtual Exchange

Appendix: Protocols for Collecting Qualitative Data About Virtual Exchange Programs

The Stevens Initiative

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Protocols for Collecting Qualitative Data About Virtual Exchange Programs

RTI conducts site visits, either in person or virtually, of awardee virtual exchange programs as part of its independent evaluation of the Stevens Initiative. During those site visits, RTI researchers collect qualitative data through interviews, focus groups, and observations. This document contains the data collection protocols RTI developed for evaluation of Stevens Initiative-funded programming, with some adjustments so they can be applied to a wider array of virtual exchange programs. If you decide to adopt these protocols, adapt them to your specific context to ensure you collect data about activities or intended outcomes that are not covered below.

The following example protocols are included in this document:

- Focus Group with Virtual Exchange Participants
- Interview with Virtual Exchange Facilitator
- Observation of Virtual Exchange Activity

Important considerations when using these items:

Planning for the site visit: Site visits require advanced planning to schedule the interviews, focus groups, and observation. Identify a program staff member who will serve as the point person for the visit. Work with that person to identify an appropriate date for the visit that is at least half-way through the program so that participants and the facilitator will have had some experience in the program. Consider avoiding the last day of the program when program closure activities may occur. Develop a schedule for a visit with the program point person, allowing about three hours for the visit. Ideally, two site visitors will conduct this visit. Additional planning information associated with each of the protocols is described in Sections 1, 2, and 3 below.

Consent and anonymity: The focus group and interview protocols should begin with an introduction that includes the evaluator clarifying for the respondents that their participation is voluntary and their responses will remain anonymous. The observation protocol does not include a similar introduction, but it is important for the evaluator to communicate with the facilitator prior to the observation to explain the purpose of the observation and to gain his or her consent for the observation. The facilitator should let participants know about the observation ahead of time and explain that participants' names will not be recorded.

If participants are minors, the evaluator should coordinate with the facilitator or program administrators to determine whether parental guardian or consent, either passive or active, should be requested prior to the focus group and observations. Passive consent involves notifying parents about the focus group or observation ahead of time and allowing parents to opt their child out of the activity by notifying the facilitator. Active consent typically involves having parents sign and return a consent form. Schools and school districts have different requirements about whether parental consent is needed, so virtual exchange program administrators and evaluators should consult with school officials before conducting a visit if the program is taking place through a school.

Native language considerations: The example protocols included in this document are in English. The Stevens Initiative supports virtual exchange programs between youth in the United States and youth in the

Middle East and North Africa (MENA). RTI has, therefore, conducted in-person and virtual site visits with participants and facilitators in the MENA region. In planning for MENA site visits, RTI asks program staff if they think participants and facilitators will feel more comfortable conducting the focus group or interview in Arabic or English (RTI included a native Arabic speaker on a recent site visit in the MENA region). RTI evaluators confirm this information at the beginning of the site visit and proceed accordingly. If a program does not have access to multilingual interviewers or focus group facilitators, and the program thinks it is important to conduct the interviews and focus groups in participants' native language, consider hiring an interpreter. Give the interpreter time to become familiar with the protocol and prepare for their translation of the questions.

Virtual site visits: RTI has successfully conducted virtual site visits, often using whichever platform the program uses for its virtual exchange (e.g. Zoom or Skype). Just as with in-person site visits, virtual site visits require advance planning to schedule the interviews, focus groups, and observation. Identify a program staff member who will serve as the point person for the virtual visit.

1. Focus Groups with Virtual Exchange Participants

Ideally, focus groups should involve 6-10 participants, last 45 to 60 minutes, and should be held in a space where the participants and evaluators have privacy and there are minimal sound or visual distractions. In the weeks leading up to the visit, ask the program point person to identify a subset of participants for the focus groups if there are more than 10 program participants. The focus group participants should represent the diversity of the full set of program participants, including proportional gender balance. Clarify to the program point person that it is important for the focus groups to include participants with a variety of program experiences, not just those the point person suspects have been very satisfied with the program.

The virtual exchange facilitator and any other authority figure, such as other teachers, should *not* attend the participant focus groups. This will help participants feel comfortable talking candidly about their experiences. If the focus group is held in person, arrange chairs in a circle prior to participant arrival. The evaluators should greet participants warmly as they enter the room. If the focus group is occurring virtually, ask the participants to arrange themselves so that the evaluators can see and hear everyone clearly. The evaluators should also make sure the participants can see and hear the evaluators clearly.

Ideally, two evaluators will participate in the focus group: one who asks the questions and a second who takes notes. If only one evaluator is available, it is especially important to record audio of the discussion so the evaluator can listen to the recording later and write notes based on the recording. Even if there are two evaluators present, with one focused on taking notes, having a recording will help note takers complete their notes if they were not able to capture all the information in real time.

The focus group protocol contains four general sections: a) an introduction to the focus group, b) a warm-up question that is asked of each participant so that everyone has an experience talking early in the session, c) the focus group questions, and d) closure of the focus group.

As the evaluator is asking the questions, it is important to encourage broad participation. This can be done by making sure to look around the group and not visually directing questions only to the most vocal participants. If one or just a few participants tend to do most of the talking, turn to a participant who has so

far been quiet and gently ask a question such as, “Do you agree or disagree?” or, “Do you have a similar or different perspective?”

A. Introduction to the focus group

Thank you for your willingness to participate in our focus group. [Evaluators introduce themselves. If there are two, explain that one will be asking questions and the other taking notes].

The purpose of the focus group is to obtain feedback on the [xyz] program. The information learned in this group will be used to [design other virtual exchange programs, improve this program for future participants, etc]. You can choose whether or not to participate in the focus group and can leave at any time. We are not writing down your names and your responses will remain anonymous. We will share what we learn during this focus group [with the leaders of the program/the funders of the program], but we will not tie specific comments to any of your names.

There are no right or wrong answers to the focus group questions. We want to learn from you about your experiences in the program. We want to hear many different viewpoints and would like to hear from everyone. We hope you can be honest, even when your responses may not be in agreement with the rest of the group or when your responses might be critical of the program. Out of respect for each other, we ask that only one individual speak at a time in the group.

We would like your consent to make an audio recording of the focus group so we can complete our notes, at which point we will delete the recording. Is that okay with everyone? (If all give verbal agreement or nod yes, turn the recording on.)

Do you have any questions before I start with my questions?

Again, you can stop participating in the focus group at any time. Does anyone want to leave before the session begins?

B. Warm-up question

1. *Please go around and introduce yourselves, just with your first name, and tell us how long you have been at this school/college [if applicable, or some other question that will be easy for everyone to briefly answer].*

C. Focus group questions

Program Goals, Strengths, and Weakness

2. *In your own words, what do you think are the goals of this program?*
3. *What was the best part about the program?*
4. *What has been the biggest challenge you have faced so far in the program?*
5. *What were your expectations coming into the program? Has it lived up to those expectations?*
6. *Do you have any recommendations for improving the program?*
7. *Would you participate in another virtual exchange program in the future or encourage others to participate? Why or why not?*

Student Outcomes

8. *What skills or knowledge, if any, did you gain as a result of your participation in this program?*
 - a. *What skills? What knowledge? How did this program help you develop them?*
9. *What did you think about [partner country] before you started this program?*
 - a. *What did you learn about that country or its culture through participation in the program? What was most surprising to you?*
 - b. *Did your views and opinions about other cultures/countries/people change as a result of this program? How?*
 - c. *What about your views and opinions about your own culture/country/people?*
10. *Have you changed your behavior in any way after participating in this program?*
11. *Has your participation in this program affected your future career plans or interests? If so, how?*

D. Closure of focus group

We really appreciate the time you have given today and the information you have shared. Before we end, is there anything else you would like to tell us about your experience in the program?

2. Interview with Virtual Exchange Facilitator

RTI conducts individual interviews with educators or program staff members who facilitate virtual exchange between youth participants. Ideally, two evaluators should participate in the interview, one to ask the interview questions and the other to take notes. Because there is only one respondent, as opposed to 6-10 in the participant focus groups, less time is needed for these interviews, typically about 30 minutes. As with the focus group, it is important that the interview take place in a private space with minimal sound and visual distractions, and that other staff or leaders from the program do not attend so the facilitator can speak candidly about their experience.

Similar to the participant focus group protocol, the facilitator interview protocol contains four general sections: a) an introduction, b) a warm-up question, c) the interview questions, and d) closure of the interview.

A. Introduction to the interview

Thank you for your willingness to be interviewed. [Evaluators introduce themselves. If there are two, explain that one will be asking questions and the other taking notes].

The purpose of the interview is to obtain your feedback on the [xyz] program. The information we learn through the interview will be combined with other information we are collecting through participant focus groups and observations and will be used to [design other virtual exchange programs, improve this program for future participants]. You can choose whether or not to participate in the interview and can leave at any time. Your responses will remain anonymous. We will share what we learn through the interviews, focus groups and observations [with the leaders of the program/the funders of the program], but we will not tie any specific comments to your name.

There are no right or wrong answers to the questions. We hope you can be honest and candid, including if you have had a negative experience or have critical feedback to share. We are here to learn about your experience, not to evaluate you.

We would like your consent to make an audio recording of the interview so we can complete our notes, at which point we will delete the recording. Is that okay with you? (If the interviewee gives verbal agreement or nods yes, turn the recording on.)

Do you have any questions before I start with my questions?

Again, you can stop participating in the interview at any time. Are you comfortable proceeding with the questions?

B. Warm-up question

1. *How did you become involved with this virtual exchange program? Is this your first time facilitating in this program or have you done this before?*

C. Interview questions

Program Goals, Strengths, and Weakness

2. *Describe in your own words your goals for the young people/students in the program and your own goals. What do you view as "success" for this program?*
3. *Can you please describe what you think have been the biggest strengths in this program?*
4. *What have been the biggest challenges of the program?*

Promising Practices in Virtual Exchange

5. *How much synchronous and asynchronous communication and collaboration occurs between [country x] and [country y] participants? By synchronous we mean participants are interacting in real-time together (e.g., on a videoconference) and asynchronous means they are not interacting in real-time (e.g., emailing each other, posting on a website, etc).*
 - a. *What is your perspective about your program's ratio of synchronous and asynchronous communication and collaboration? Do you feel it is effective? Why or why not?*
 - b. *In what ways do [country x] and [country x] participants communicate and collaborate asynchronously (e.g., posting on website, emails)?*
 - a. *Are there specific tools or practices you have observed to be particularly effective for communication and collaboration in virtual exchange? Or not effective?*
6. *How have participants responded to the content or subject matter of your exchanges?*
[Probe for differences or similarities in [country x] and [country y] participants' responses]
 - a. *Do you think students have learned more, less, or differently about the content or subject matter because of the virtual exchange component, as opposed to if the course did not include any virtual exchange?*
7. *What has been effective or not effective in terms of you facilitating the exchange?*
 - a. *What types of training, professional development, or other supports does your program provide to you?*
 - b. *What has been effective or not effective in terms of training, professional development, or other supports you have received? What other supports would you want, if any?*

8. *Which activities have seemed most engaging for participants?*
 - a. *What do you think could be done to make the program more engaging?*
9. *What technological platforms have you used in this program? Have they been successful? Why or why not?*
 - a. *What changes would you want made to the platform(s)?*
10. *What recommendations would you make for improving your program?*

Student Outcomes

11. *What do you think are the key outcomes for participants in this program? What knowledge and skills do you hope participants gain?*
12. *What types of progress have you seen participants make with regard to these outcomes?*
13. *What aspects of the program do you think have brought about these changes?*
14. *Are there changes that you expected to see, but didn't?*
15. *Have you observed any differences between [country x] and [country y] participants in terms of outcomes?*

D. Closure of the interview

We really appreciate the time you have given today and the information you have shared. Before we end, is there anything else you would like to tell us about your experience facilitating this program?

3. Observation of Virtual Exchange Activity

RTI observes program activities during site visits, in addition to conducting participant focus groups and facilitator interviews. The evaluators should observe an authentic activity, one that the participants would normally conduct as part of the program, not an activity that was scheduled or organized for the benefit of the evaluators. If the program includes synchronous exchange and the evaluators will be visiting during a synchronous activity, they ask to observe that activity. If the program does not include synchronous activities or it is not feasible to observe one during the visit, the evaluators ask to observe an asynchronous activity or to join virtually during a later synchronous activity.

The virtual exchange programs supported by the Stevens Initiative have varied across many dimensions. Some involve middle grade students, others high school students, and still others, postsecondary students or other young adults. Some are embedded in for-credit courses, while others occur outside of formal education programs (e.g., in after-school settings, during the summer, or in refugee camps). Also, the substantive focus has varied; programs have focused on science, international relations, personal storytelling, and many other topics. Given the great variety of programs, RTI needed to develop an observation protocol that could be useful across diverse settings. The observation protocol included below has been an effective tool in guiding RTI's observations. Evaluators of specific programs may want to tailor the protocol to look for specific activities or practices that are unique to that program.

Example Virtual Exchange Observation Form

Name of Site: _____

Date: _____

Name of Program: _____

Observer: _____

of Youth Participants: _____

Education/Age Level: _____

and Role of Adults _____

1. Description of Activity:

asynchronous

synchronous

other

2. Level of Participant Engagement:

High _____ Medium _____ Low _____

Notes explaining engagement rating:

3. What, if any, key global competencies did this activity appear to address? (Circle all that apply and include a short description of how.)

- Knowledge of the Other Country or Culture:
- Knowledge Seeking (about the other country or culture):
- Perspective Taking:

- Empathy:
- Cross-Cultural Communication:
- Cross-Cultural Collaboration:

4. How well did the technology work during the observation?

Well Fair Poor Not Applicable (no technology needed for this session)

Please explain the rating above and describe the use of technology observed:

5. Describe any positive elements or support for the Virtual Exchange observed:

6. Describe any challenges or barriers to the Virtual Exchange observed (other than technology):

7. Note any questions to follow up on by asking participants during the focus group, facilitator during the interview, or to think about with the evaluation team:

Want to be part of the change?

To share the story of your virtual exchange program, email the Stevens Initiative at stevensinitiative@aspenninst.org.

Engage with us online. Visit our knowledge hub at www.stevensinitiative.org/resources

Twitter: <https://twitter.com/StevensInit>

Facebook: <https://www.facebook.com/StevensInitiative/>

The Stevens Initiative is an international effort to build global competence and career readiness skills for young people in the United States and the Middle East and North Africa by growing and enhancing the field of virtual exchange. It is a lasting tribute to Ambassador J. Christopher Stevens, a public servant who dedicated himself to building understanding between people from different countries. The Stevens Initiative is sponsored by the U.S. Department of State, with funding provided by the U.S. Government, and is administered by the Aspen Institute. It is also supported by the Bezos Family Foundation and the governments of Morocco and the United Arab Emirates.

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