HISTORICAL RESEARCH

# RESEARCH QUESTION

What is your research question?

# GATHERING SOURCES

Which types of materials might address your question?

Where are they held? Who owns them? Will you need to get someone’s permission to use them?

Will a library catalog search be useful? In which libraries?

Which secondary sources will you consult, in order to identify relevant primary sources?

Will you need to travel to any specific collections in order to identify and use particular primary sources?

# CAPTURING THE DATA

How will you capture the data you need from the sources you find?

# OTHER ISSUES

Are there any other issues related to conducting historical research that you should anticipate?

EXISTING DOCUMENTS AND ARTIFACTS AS DATA

# RESEARCH QUESTION

What is your research question?

# DOCUMENTS AS DATA

Which types of documents might serve as data for your study?

Public/official documents

Financial documents for an organization

Official statements and reports

Memos or other internal communications

Diaries and personal records

Images or video recordings

Others

From what sources can you obtain these documents?

Where are they held? Who owns them? Will you need to get someone’s permission to use them?

Will the documents require any special handling, in terms of privacy or confidentiality?

# ARTIFACTS AS DATA

What artifacts might serve as data for your study?

Physical trace data: erosion, accretion

From what sources can you obtain these artifacts?

Where are they held? Who owns them? Will you need to get someone’s permission to examine/use them?

How will you argue that the data you derive from examination of these artifacts is valid for your study purposes?

# OTHER ISSUES

Are there any other issues related to using documents and/or artifacts as data that you should anticipate?

TRANSACTION LOGS

# RESEARCH QUESTION

What is your research question?

# CAPTURING THE TRANSACTION LOGS

On what server are the transaction logs housed?

Who owns the server? How will you gain access to it or to copies of the logs?

If the logs are publicly-viewable, what procedures will you use to capture those that you need?

Are those procedures in compliance with any use policies for the relevant website/service?

Are there any privacy or confidentiality issues that may arise from your capture and use of the logs?

Do you need to capture client-side logs, for your research purposes?

Can you gain access to the client, so that it can be instrumented? How?

Which data elements do you need to capture?

What procedures will you use to generate the transaction logs?

# CLEANING THE LOG DATA, PRIOR TO ANALYSIS

How will you parse the logs, so that they can be analyzed for your study?

How will you segment the log data into specific sessions? Or identify particular users?

# OTHER ISSUES

Are there any other issues related to collecting and analyzing transaction logs that you should anticipate?

THINK-ALOUD PROTOCOLS

# RESEARCH QUESTION

What is your research question?

# CONTEXT OF IMPLEMENTING THE PROTOCOL

What is the task that each participant will be completing, while thinking aloud?

Do multiple tasks need to be designed? How many?

Should all the tasks be equivalent? Or will you use different types of tasks?

Should the task be one with which the participants are familiar, or should it be a novel task?

# THE PROTOCOL ITSELF

What form of the protocol will you use?

The traditional form, as developed by Ericsson and Simon, or a form that has been adapted in some way? If you will adapt the protocol, what is your rationale for the changes?

Will you administer the protocol concurrently or retrospectively? Why?

Will you administer the protocol to one participant at a time, or will they be engaged in a collaborative task and protocol?

Will you be physically present with each participant as the protocol is administered, or will it be administered remotely?

Will you use the protocol in combination with other methods of data collection, e.g., transaction logs or video-recording?

# PREPARING THE PROTOCOL DATA FOR ANALYSIS

Will you transcribe the protocol word-for-word? If not, what method will you use to convert a recording into a form that can be analyzed?

How will you synchronize the protocol data with the task completion data, for analysis?

# OTHER ISSUES

Are there any other issues related to collecting and analyzing transaction logs that you should anticipate?

RESEARCH DIARIES

# RESEARCH QUESTION

What is your research question?

# DIARY FORM/STRUCTURE

How much structure will the diary entries have? What types of structure? Which data elements are most important to your study?

Will the diary be “written” on paper, or recorded in some other way, e.g., photos, online, recorded phone calls?

# PROMPTING DIARY ENTRIES

How often will each participant be expected to create a diary entry?

How will the participant know when to make an entry? Will you prompt the entries in some way?

How many diary entries will each participant be expected to make? Over what period of time?

# PREPARING THE ENTRIES FOR ANALYSIS

Will the diaries be used in conjunction with some other data collection method, e.g., will they be used as a stimulus for a follow-up interview?

How will each data element in each diary be converted to a form in which it can be analyzed?

# OTHER ISSUES

Are there any other issues related to collecting and analyzing transaction logs that you should anticipate?

SEMI-STRUCTURED INTERVIEWS

# RESEARCH QUESTION

What is your research question?

# INTENDED PARTICIPANTS

Who do you expect to interview? (We’ll develop the sampling plan later, but to develop the interview guide, you need to anticipate the characteristics of the interviewee.)

Do they have particular professional expertise or personal experience?

Who might be able to help you pretest the interview guide?

# DEVELOPING THE INTERVIEW GUIDE

What are the essential questions you’d like to ask?

What probes may be necessary to make sure that you get all the data you need, in relation to each?

Are there any extra questions you’d like to ask?

How might you start the interview, in order to develop rapport with the interviewee?

Are there any closed-ended questions that you’d like to ask? How can they be expressed in a less formal way?

# CONDUCTING THE INTERVIEW

Where will the interview be conducted?

Is the space private enough?

If the interview cannot be conducted face-to-face, what method of communication will be used?

Will all the potential participants have access to the necessary technology?

# CAPTURING AND PREPARING THE DATA FOR ANALYSIS

Will you record the interview? Video or audio?

Will you take notes during the interview? How extensive? What will you capture in your notes?

Will you transcribe the recordings? Word-for-word or partially?

Will you do it yourself or hire a transcription service?

# OTHER ISSUES

Are there any other issues related to planning, conducting, or capturing the interviews that you should anticipate?

FOCUS GROUPS

# RESEARCH QUESTION

What is your research question?

# SELECTING A MODERATOR

Will you use an experienced moderator to conduct your focus group?

Do you have access to someone who can serve in this role?

If not, how will you gain the necessary expertise to play this role yourself?

# IDENTIFYING AND RECRUITING PARTICIPANTS

What characteristics should someone have to be able to make valuable contributions in your focus groups?

Are there any exclusion criteria for participation?

Through what means might you recruit people with these characteristics?

Given the recruited participants, how should the groups be formed?

Should they be homogeneous on certain characteristics? Heterogeneous on others?

Should the participants know each other, or should they not be acquainted?

How big/small should each group be?

How many groups will there be?

# MANAGING THE FOCUS GROUP SESSION

Where will the focus groups be held?

Will they be conducted face-to-face or online?

How will the group’s discussion be recorded/captured?

Will you record all of it? Will you use a scribe? Both?

Will the focus group data be used in conjunction with other data sources for your study? How will they be integrated?

# OTHER ISSUES

Are there any other issues related to planning, conducting, or capturing the interviews that you should anticipate?

SURVEY RESEARCH

# RESEARCH QUESTION

What is your research question?

# INTENDED PARTICIPANTS

Who do you expect to complete your survey? (We’ll develop the sampling plan later, but to develop the survey, you need to anticipate the characteristics of the respondents.)

Do they have particular professional expertise or personal experience?

Who might be able to help you pretest the survey?

# DESIGNING THE SURVEY INSTRUMENT

Has anyone else conducted a survey related to your research question, so that you could adapt their survey to your purposes?

What are the questions you need to ask on your survey?

In what order will they be asked?

How many questions will you ask on your survey?

How will you pilot test your survey?

# ADMINISTERING THE SURVEY

In what form will the survey be administered: paper, online, by phone, etc.?

In what ways will the form of administration influence the design of the survey?

How will it be distributed? How will it be collected?

What methods can you use to maximize your response rate?

# OTHER ISSUES

Are there any other issues related to designing or administering the survey that you should anticipate?

MEASURING COGNITIVE AND AFFECTIVE VARIABLES

# RESEARCH QUESTION

What is your research question?

# IDENTIFYING AN APPROPRIATE MEASURE

What construct(s)/variable(s) do you need to measure?

What are the existing instruments for measuring each construct/variable?

Which best serves your purpose, in terms of matching the construct’s definition and the target audience?

Is it efficient, in terms of placing only a small burden on the respondent?

# ASSESSING THE RELIABILITY AND VALIDITY OF AN INSTRUMENT

How reliable is the instrument you’re considering?

What is its internal consistency statistics (Cronbach’s alpha or similar)?

Have any other reliability studies been conducted of the instrument?

How valid is the instrument you’re considering?

Content validity: usually evaluated as face validity

Criterion-related validity: usually evaluated in terms of this measure’s ability to predict scores on another related or similar measure

Construct validity: usually evaluated with 1) factor analysis; 2)examination of the correlations in a multitrait-multimethod matrix; or 3) relationships between other constructs and the construct measured with the instrument in question, in the context of a known theoretical framework

# OTHER ISSUES

Are there any other issues that you should anticipate, related to administering a particular instrument?