

Interview Protocol for University of Michigan Master of Health Professions Education

SI 501 Task 4 Interview Protocols (Group Task)

Group 4K

Introduction

In our client's information system, we identified different user groups who make up the system. The two program managers who support the University of Michigan Master of Health Professions Education (MHPE) reached out to the SI501 instructors in order to improve the program's communication and document management processes. The administrators reported feeling inundated by the amount of requests for information and support they receive from a range of program stakeholders. At the same time, they reported receiving few responses to the communication streams that they themselves initiate. Content management is also challenging, particularly since the University of Michigan will be retiring CTools—one of two commonly-used content management tools—after this year.

High level administration, such as setting program goals and policies and the admission process, is managed by three committees. MHPE uses an unconventional mentor-learner model, in which students—called “learners” in the MHPE vernacular—attend no classes, but instead interact extensively individual mentors to help them achieve their academic and professional aims. There are currently 14 learners seven of which are in Ann Arbor, while the other seven reside in other parts of the United States. To date, the program has not expanded internationally.

We have previously worked with the two administrators to ensure that we will be speaking with committee members, mentors, and students. In developing our protocols, we further differentiated between key groups within these three categories. In total, we have developed five protocols that we believe capture the range of roles in the MHPE program: on-campus learner, off-campus learner, mentor, committee member, and program manager. While we did not develop sixth full protocol for mentors who are also committee members, we did develop a block of questions condensed from the committee member protocol to ask these individuals.

Preamble¹

My name is [fill the blank] and I am a first-year [fill in degree program] at the University of Michigan [studying/focusing on] [specialization].[repeat for all interviewers and note-takers] As part of our “Contextual Inquiry” class through the School of Information, we are working with the Master of Health Professions Education program to improve information flow and content management across program stakeholders. We understand that communication and accessing information when you need it can be challenging—as they are in almost every institution in every sector. Our purpose here today is to learn from you about what your needs are, what elements of the communication and information management support that you're currently receiving are going well, and where some of the challenges are. We have only experienced the role of a traditional student, so we are really looking to you to for your insights into challenges and potential solutions. We will also be interviewing several students, mentors, and committee

¹ Holtzblatt, Karen, Jessamyn Burns Wendell, and Shelley Wood. Rapid contextual design: a how-to guide to key techniques for user-centered design. Elsevier, 2004. P. 83

members, as well as the program administrators. We will then develop recommendations for improving communication and information management based on your input. In addition, we will not identify who told us specific information in any of our communications with MHPE stakeholders or in any materials we develop.

The process we will be using today is called “Contextual Inquiry.” Are you familiar with this method? [If no] The idea behind contextual inquiry is that we can learn about a process much more effectively by watching someone go through their normal activities than if we just asked you questions². Therefore, we are going to ask you to walk us through some of your key MHPE activities on your computer, or whatever tools you normally use.

Your participation is voluntary and you can choose not to answer any questions or to end the interview at any time. This interview will last about from 40 minutes to an hour. Do you consent to participating in this interview?

We would like to record this conversation to make sure we capture your insights accurately. We will destroy these recordings after the project is over. However, if it's against school's policy or if you would rather we not record, we certainly don't have to. Would we be able to record today's interview? [If no: No problem! Please bear with us while we take notes.]

² Holtzblatt, Karen, Jessamyn Burns Wendell, and Shelley Wood. Rapid contextual design: a how-to guide to key techniques for user-centered design. Elsevier, 2004. P. 74

Interview A: Mentor interview

Job title: Mentor of UM MHPE

- **Daily routine:** The first thing we would like to do is learn what your day looks like, and how your MHPE activities fit into the rest of your life. We may ask you to show us how you use some of the content management and communication tools you use. Can you take us through an average day?
 - *Prompts in case of interviewee confusion if we don't hear answers to these questions in the course of the interviewee's description:*
 - Do you usually come into the office or do you telecommute?
 - Do you spend some time each day on MHPE activities or dedicate portions of certain days to programmatic work?
 - What is the first thing you do when you come into the office?
 - What tools do you use for this particular role?
 - What communication/social media tools do they use professionally and personally
 - Who/where do you go to find information in your personal life?
 - Who/where do you go to find information for your work with MHPE? Your work outside of MHPE?
 - Do you have a system for identifying important communications?
 - Do you use different media depending on the urgency of the message?
[Example: texts for messages that need an immediate response, email for less urgent messages]
 - Do you use tags or filters in your email?
 - How do you feel about the volume of emails exchanged by all stakeholders in the MHPE program? Do you feel that you receive any superfluous email threads?
- **Communication with committees:**
 - Do you serve on any of the program committees?
 - [If yes] :
 - On which committee do you participate? What is the function of this committee?
 - Can you describe how committee members communicate with each other and keep up-to-date?
 - Does anyone take notes at meetings? If so, are they disseminated? To whom? How are they accessed if they are not disseminated?
 - Can you describe how committees communicate with each other?

- Can you describe how committees communicate with program administrators, mentors, and students?
 - [If no] :
 - Can you describe how high-level changes to the MHPE program are communicated to you?
- **Student communication:** Now I'd like to talk about how you interact with your students.
 - Can you describe what your role is as a mentor? *[Note: We're listening to for discrepancies between different people's understandings of role delineation.]*
 - Please describe how you communicate with your learners. *[Prompts: frequency, communication methods, information discussed]*
 - Do you find any of your learners needing much more or much less support/communication than others? If so, do you have a sense of why this might be?
 - In case of distant learners, how do you communicate with them? Do you find advantage of it? or do you find any inconvenience?
 - How do learners prefer to contact and communicate with you? How do you prefer to contact and communicate with learners?
 - Do your learners come to you with questions that are outside the scope of your role, or to which you don't know the answer? How have these issues been resolved?
 - **Problems in communication with learners**
 - Can you describe some of the challenges you have encountered in communicating with learners? *[Prompt: length of the problem, solved or on-going]*
 - *[If they have solved any of their communication challenges] How did you resolve this particular situation?*
 - *ESL-specific, if these challenges have not been covered:* John mentioned that your students speak English as a second language. Are there challenges in working with your students? How have you addressed these? *[Note: We're listening for lots of things here including: burden; special content-management or communication strategies/tools that might be needed; conflict between student/mentor needs and programmatic expectations; conflict between student/mentor needs and technological limitations of MHPE's tools]*
- **Content management:** I understand that determining where documents and other educational materials can be difficult. Can you show us your current system for storing and retrieving documents and other content?

- How did you develop your system? *[Note: We're listening for whether mentors collaborate, as well as what the distinct needs are.]*
- What works well in your current system, and with the current tools? What do you find challenging?
- Can you describe other particularly helpful, or particularly challenging content management tools you may use in non-MHPE contexts?

- **Content experts:** I understand that MHPE has a number of content experts on staff. Have any of your learners needed to be connected to a content expert?
 - Can you show us how you [went about/would go about] connecting learners to these experts?

- **Interaction with program managers:** We would like to switch tracks and learn about your administrative needs. Can you describe what you need from the administrative office?
 - How do you find out about logistical information (e.g., upcoming deadlines, payroll issues, etc.)?
 - Can you describe your communication with John and Dawn? *[Prompt: frequency, mode]*
 - What are some of the ways in which the support you receive helps you in your role?
 - Are there ways in which you feel insufficiently supported? *[Note: This and the above question are framed broadly in order to avoid unnecessarily constraining interviewees' answers. However, we will be listening for what information they need, what action needs to be taken, the timing of the exchange, and the communication method.]*

Interview B: Committee Interview

Job title: Committee member of UM MHPE

- **Daily routine:** The first thing we would like to do is learn what your day looks like, and how your MHPE activities fit into the rest of your life. We may ask you to show us how you use some of the content management and communication tools you use as a mentor of the program. Can you take us through an average day?
 - Prompts in case we don't hear the following information:
 - Do you usually come into the office or do you telecommute?
 - Do you spend some time each day on MHPE activities or dedicate portions of certain days to programmatic work?
 - What is the first thing you do when you come into the office?
 - What communication tools do you use in your work
 - What content management system do you use in your work?
 - Who/where do you go to find information for work?
 - Who/where do you go to find information in personal life?
 - What difference do you have in finding information in personal life and work?
- **Communication within committee:** We would like to understand more about communication between committee members.
 - I heard that you belong to [_____] committee. What is the function of that committee?
 - What are some of the key topics of discussion?
 - How many members are there in your committee?
 - What is your role within the committee?
 - What is the most challenging part in carrying out your committee task?
 - What are your primary tools of communication within the committee?
 - Is this tool exclusive to committee members?
 - How did you start to use this tool for communication in your group?
 - Are you happy with your current communication tool? If not, can you describe any bad experience you had before?
 - How do you share common schedule or appointment within committee members? Can you describe your process of scheduling?

- **Student/mentor communication:**
 - Do you interact directly with learners? If so, can you describe what these interactions look like?
 - Do you interact directly with mentors? If so, can you describe what these interactions look like?

- **Content management:** I understand that determining where documents and other educational materials can be difficult. Are there documents that multiple committee members need to access? *[prompt: meeting minutes, official policy statements, etc.]*
- *[if so]* What is your current system for storing and retrieving documents and other content?
 - How did you develop your system? *[Note: We're listening for whether committees collaborate, as well as what the distinct needs are.]*
 - What works well in your current system, and with the current tools? What do you find challenging?
 - Can you describe other particularly helpful, or particularly challenging content management tools you may use in non-MHPE contexts?

- **Interaction with program managers:** We would like to learn about your administrative relationships.
 - Can you describe your communication between you and program manager? *[Prompt: frequency, mode]*
 - How do you find out about logistical information (e.g., upcoming deadlines, payroll issues, etc.)?
 - What are some of the ways in which the support you to receive helps in your role?
 - How many emails per a week do you receive from program managers?
 - How many emails per a week do you send to program managers?
 - Are there ways in which you feel insufficiently supported? *[Note: This and the above question are framed broadly in order to avoid unnecessarily constraining interviewees' answers. However, we will be listening for what information they need, what action needs to be taken, the timing of the exchange, and the communication method.]*

Interview C: Program Manager Interview

Job title: Program manager of UM MHPE

- **Daily Routine:** The first thing we would like to do is learn what your day looks like, and how your MHPE activities fit into the rest of your life. We may ask you to show us how you use some of the content management and communication tools you use. Can you take us through an average day?
 - Could you show us your routine on a typical day?
 - How much time do you spend on document and other content management activities per day?
 - Can you show us your content management process? [*prompt: different tools, key functionalities, security, interface issues*]
 - How much time do you spend answering requests for information on a typical day?
 - Can you show us your system for prioritizing messages?
 - How do you keep track of messages/requests you couldn't immediately address?
 - When do you typically return to these requests?
 - One common experience is that email can be disruptive. Have you found this to be a challenge? How have you dealt with this?
 - We know that there are some "special days" in your work, like dealing with the application materials during the application season or being very busy at the beginning of a semester. So is there anything "special" about your routine during the busy time? [*Note: in addition to information-specific processes and tools, we will listen for any supplementary resources that administrators can draw on.*]
 - Could you describe your system for prioritizing which tasks/requests for information you attend to first? (prompt: "important" people, different methods of communication like phone calls vs emails)
- **Communication with Mentors:** We would like to learn about your communication with mentors first. Could you describe your communication with mentors?
 - Approximately how much time do you spend communicating with mentors each day?
 - **Supporting Mentors:** We understand program stakeholders come to you for with a variety of questions.
 - How do mentors prefer to contact you?
 - How often do mentors contact you? Do any of the mentors contact you much more or less frequently than others? Do you have a sense of why this might be?

- What kinds of requests do they commonly make?
 - [If they answered “yes” to unequal mentor communication] You mentioned that [NAME] tends to contact you more than other mentors. Can you describe the kinds of support that he/she requests?
 - Follow-up question: How often do you connect mentors, learners, and committee members to each other/other personnel?
- **Initiating contact with mentors**
 - How do you prefer to contact mentors?
 - What are some of the key reasons for contacting mentors? [Prompts: Logistic information, organizing meetings, etc.] [Note: we’re listening for whether there’s an action that John and Dawn would like the mentors to take]
 - What method of communication do you prefer when speaking with mentors?
- **Problems in communication with mentors**
 - Can you describe some of the challenges you have encountered in communicating with mentors? [Prompt: length of the problem, solved or on-going]
 - [If they have solved any of their communication challenges] How did you resolve this particular situation?
- **Communication with Learners:** We then would like to learn your communication with learners. Could you describe your communication with mentors?
 - Approximately how much time do you spend communicating with mentors each day?
 - **Supporting Learners:** We understand program stakeholders come to you for with a variety of questions.
 - How do learners prefer to contact you?
 - How often do learners contact you? Do any of the learners contact you much more or less frequently than others? Do you have a sense of why this might be?
 - What kinds of requests do they commonly make?
 - [If they answered “yes” to unequal learner communication] You mentioned that [NAME] tends to contact you more than other learners. Can you describe the kinds of support that he/she requests?
 - Follow-up question: How often do you connect mentors, learners, and committee members to each other/other personnel?

- **Initiating contact with learners**
 - How do you prefer to contact learners?
 - What are some of the key reasons for contacting learners? [Prompts: Logistic information, Lectures or activities information, etc.] [Note: we're listening for whether there's an action that John and Dawn would like the learners to take]
 - What method of communication do you prefer when speaking with learners?
- **Problems in communication with learners**
 - Can you describe some of the challenges you have encountered in communicating with learners? [*Prompt: length of the problem, solved or on-going*]
 - [*If they have solved any of their communication challenges*] How did you resolve this particular situation?
- **Communication with distant learners**
 - Could you give us an example of most recent communication with distant learners?
 - What's the content and form of this communication?
 - What's your feeling of this communication?
 - From your perspective, do you think it is convenient to contact with the distant learners?
 - What's the biggest challenge in your communication with distant learners compared with the on campus learners?
 - Do you have any suggestions or needs of support which can make the communication easier?
- **Communication with Committees:** We also would like to learn your communication with committees. Could you describe your communication with committees?
 - Approximately how much time do you spend communicating with committees each day?
 - **Supporting Committees**
 - Could you give us a brief introduction of the structures of committees?
 - How many committees in this program?
 - What are the functionalities of different committees?
 - We understand program stakeholders come to you for with a variety of questions.
 - How do committees prefer to contact you?

- How often do committees contact you? Do any of the committees contact you much more or less frequently than others? Do you have a sense of why this might be?
 - What kinds of requests do they commonly make?
 - [If they answered “yes” to unequal committee communication] You mentioned that [NAME] tends to contact you more than other committees. Can you describe the kinds of support that it requests?
 - How often do you connect mentors, learners, and committee members to each other/other personnel?
- **Initiating contact with committees**
 - How do you prefer to contact committees?
 - What are some of the key reasons for contacting committees? [*Prompts: Logistic information, organizing meetings, etc.*] [*Note: we’re listening for whether there’s an action that program managers would like the committees to take*]
 - What method of communication do you prefer when speaking with committees?
- **Problems in communication with committees**
 - Can you describe some of the challenges you have encountered in communicating with committees? [*Prompt: length of the problem, solved or on-going*]
 - [If they have solved any of their communication challenges] How did you resolve this particular situation?
- **Content management:** I understand that determining where documents and other educational materials can be difficult. Can you show us your current system for storing and retrieving documents and other content?
 - How many information systems are you using now?
 - What’s your preference of those information systems?
 - Do you have a sense for which information system is most likely be visited for mentors, learners and committees.
 - How often do you update the information system?
 - What’s the advantages and disadvantages of each information system?
 - In other words, what’s the function of each information system. For example, CTools may good at storing lectures and documents while wiki pages are designed to give information to other people who have no access to CTools.

- Problems in content management
 - Could you describe a specific problem you meet in information system management for us?
 - What's the usual reason for those problem?
 - Were you able to solve these issues? If so, can you describe how you solved them?
 - How long do those problems generally last?

Interview D: Learners on Campus Interview

Job title: On-Campus Learners

- **Daily routine:** Please walk through your daily routine:
 - When do you work? When do you study and do assignments? How often do you typically come to the University of Michigan campus?
 - What do days when you do not come on campus look like?
 - What communication/social media tools do you use as a learner at MHPE?
 - What communication/social media tools do you use in other professional and personal avenues?
- **Communication with Mentors**
 - One of our focuses is on communication. Could you describe your interactions and communications with your mentor?
 - What do you typically discuss with your mentor?
 - On average, how long does your mentor take to respond to your messages and inquiries?
 - How do you prefer to communicate with your mentor (e.g., in person, phone, email, etc.)
 - If your mentor wants to reach you, how does he/she contact with you?
 - [If different from the learner's preferred method of communication] How do you feel about this mode of communication?
 - Could you tell us the last time he/ she reached you?
 - Do you ever encounter any challenges in communicating with your mentor (e.g., difficulty reaching them, they were unable to answer questions, etc.)? If so, can you describe the situation?
 - [If they answered "yes"] Have you been able to resolve this issue? If so, what was the resolution?
 - As you have regular meeting with your mentor, would you please talk about the last time you have met with him/her?
 - What is the content of the meeting? How was it conducted?
 - Do you find these meeting helpful? Why?
- **Communication with Project Managers**
 - Can you show us where you go to find out administrative information (e.g., requirement details, enrollment, etc.)?

- What kinds of information are you typically looking for?
- Who is generally your first point of contact if you can't find the information you need?
- Tell us the last time you seek for help
- Is there administrative support you would like that you feel is currently lacking?
- We understand that John and Dawn periodically reach out to learners regarding changes to the program and other important administrative details. Can you describe what that kind of interaction looks like? What kinds of information do they typically disseminate?
 - How often do the program managers contact you? How do you feel about the volume of emails you receive from program managers?
 - Could you tell us the recent communication you have with them?
- **Communication with Committees**
 - From your perspective, what are the typical roles committees play in the program?
 - Have you had any interaction with the committees? If so, could you describe that interaction?
 - *[If they have not spoken to committee members]* We understand that the committees set the direction and policies for the program. How have you been informed of changes in these areas?
- **Document and Information Management**
 - We would like to switch now from communication to content management. Can you show us your system for storing and accessing documents and other content related to your educational activities?
 - When do you use CTools? When do you use M+Box?
 - What is your opinion of CTools and M+Box?
 - If CTools will not be available any more, what is your expectation of the alternate?
 - Do you collaborate with any non-University of Michigan researchers? If so, can you show us how you handle document and information sharing?
 - We understand that the MHPE program has a variety of content experts to help learners. Have you worked with any of these experts, aside from your mentor?
 - *[If yes]* How did you connect with this person?

- **Interaction with Learners**

- We understand there are no formal courses in this program, which is often where learners mingle. Have you had the opportunity to meet other learners?
- Can you describe the interactions you have had with other learners?
- What methods do you use to communicate? Share information?
- Have you built personal or professional relationships with any of the other learners?

Interview E: Distant Learner Interview

Job title: Distance Learner

- **Daily Routine:** We understand that about half of your cohort are distance learners like yourself. We would like to learn from you about any additional support you may need as a distance learner. Can you describe a typical day as a MHPE learner?
 - What are your roles and responsibilities outside of MHPE?
 - How do your MHPE activities fit into these broader roles?
 - Do you spend some time each day on MHPE activities? Set aside specific days for MHPE?
 - Can you walk-through your daily routine as a MHPS student?
 - Do you have a system for identifying important communications?
 - Do you use different media depending on the urgency of the message? [Example: texts for messages that need an immediate response, email for less urgent messages]
 - Do you use tags or filters in your email?
 - How do you feel about the volume of emails exchanged by all stakeholders in the MHPE program? Do you feel that you receive any superfluous email threads?
- **Communication with Mentors:** As a distant learner, it could be hard for you to have face to face communication with your mentor. Can you offer some specific details on how you communicate with your mentor?
 - How often do you contact your mentor? By what method do you contact him or her?
 - In what areas does your mentor support you? [*prompt: What topics do you typically discuss? What questions do you typically have for your mentor?*]
 - How does your mentor assess your work?
 - What challenges have you met during the process of communicating with your mentor?
 - What potential improvement do you want to include in the process communicating with your mentor?
 - Do you feel any difference between you and students on campus in respect to learning experiences and effectiveness? Where do you perceive the differences to lie?

- **Communication with Administrators:** We would like to switch now to your interactions with the program managers.
 - In your eyes, what are the typical responsibilities and roles administrators play in the program?
 - For what issues will you contact administrator first? For what issues will you contact your mentor and then contact your administrator?
 - Has your mentor ever asked you to consult administrator?
 - *[if yes]* Can you describe the reason your mentor suggested this approach?

- **Getting information:**
 - What are the major tools and communication methods you use to communicate with mentors and administrators?
 - What are the major tools or methods you receive information from the program?
 - What do you think of the information system like Ctools and M+box, can you describe some certain situations you will use them to get information?
 - What have you liked about CTools and M+box? What has been challenging?
 - If you cannot find the information you want on information system like Ctools and M+box, what next will you do in order to get them?
 - What is your opinion about the weekly newsletters?
 - As a distance learner, what are the challenges you face compare to on campus learners when searching required materials?
 - What additional functions would you recommend to add on current information systems? Especially in the sake of distant users?

Reference

[1] Holtzblatt, Karen, Jessamyn Burns Wendell, and Shelley Wood. Rapid contextual design: a how-to guide to key techniques for user-centered design. Elsevier, 2004. P. 74

[2] Holtzblatt, Karen, Jessamyn Burns Wendell, and Shelley Wood. Rapid contextual design: a how-to guide to key techniques for user-centered design. Elsevier, 2004. P. 83