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## **Focus Group Methods: A Follow-Up to Questions Raised by Alumni Survey Results**

James B. Flynn, Ph.D.  
**Harford Survey Research**

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## **Focus Group Methods: A Follow-Up to Questions Raised by Alumni Survey Results**

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### **Overview**

This paper reviews the rationale behind the use of focus group methods, discusses the potential uses of focus groups in alumni advancement and presents a detailed set of procedures for conducting focus groups as a follow-up to questions raised by alumni survey results.

### **History of Focus Group Methods**

In the 1950s, marketing firms used surveys to identify the types of products consumers wanted to purchase. While surveys did identify what consumers liked, survey results did not explain *why* some products appealed to consumers and others did not. To answer the question *why*, marketing researchers used focus group methods to gain greater insight into consumer purchase decisions. Merton coined the term “focus group” in 1956 (Denzin & Lincoln, 1994). Since then focus groups have been used for a variety of purposes.

In addition to gaining insight into the consumer purchase decision, marketing researchers have used focus groups to identify which consumer needs are satisfied by different product attributes (Fern, 2001). Communication researchers have used focus groups to explore the effects that films and television have on children, as well as to evaluate the

effectiveness of health education messages. Focus groups have been used to assess audience reactions to radio programs and to evaluate military training and morale films. Political pollsters have used focus groups to identify where voters stand on issues, and focus group methods have been used to examine people's experiences, attitudes, needs and interests in a variety of organizational settings (Vaughn, Schumm, & Sinagub, 1996).

In spite of this popularity, practitioners have not adopted a standard methodology for collecting focus group data. Focus group methods have involved showing participants a film, letting them listen to an audiotape or view a product. Many have used open-ended questions to generate discussion among participants. Political pollsters have asked participants to discuss their reaction to a candidate's statement or platform on a given issue. Collecting data has involved writing behavioral statements on a flip chart, recording these statements on audio or videotapes, having participants rotate a dial to raise or lower a digital graph that relates to their agreement or disagreement with what is being said or having an observer document the nonverbal communication occurring in the group. Needless to say, the methods used have varied.

### **Rationale Behind Focus Group Methods**

The focus group method is a form of the group interview that capitalizes on the communication between participants to generate data. Focus groups explicitly use the interaction between participants as part of the data collection method. Participants are encouraged to talk to one another, exchange anecdotes and comment on each other's points of view. A lively and open discussion among participants is critical to the methods success. Out of this discussion are generated the behavioral examples or critical incident statements (Flanagan, 1954) that relate to alumni attitudes, feelings and opinions. Focus groups examine not only what alumni think, but also, *why* they think this way.

The rationale behind focus groups is that the discussion among participants will help alumni explore and clarify their attitudes, feelings or opinions in ways that they would not be able to do in individual or group interviews. Individuals are encouraged and supported by what they hear other alumni say, and the open, lively discussion among alumni helps alumni describe the experiences, incidents and situations that formulate the basis of their attitudes, feelings and opinions. It is the discussion among alumni that generates the behavioral examples and critical incident statements that are being sought.

The focus group moderator guides this discussion by asking the group a series of open-ended questions. Typically, this is five to seven open-ended questions. In response to these questions, participants provide specific behavioral examples or critical incident statements that describe their experiences, attitudes, feelings or opinions, as these relate to the question being asked. The focus is to obtain specific behavioral examples or statements and to have the group discuss this feedback. The moderator facilitates this discussion by encouraging alumni to discuss the open-ended question, as well as what each other says. The focus group moderator keeps this discussion from becoming a “gripe” session, and avoids talking about personalities or in generalities.

### **The Use of Focus Groups in Alumni Advancement**

Across the different disciplines, focus group methods are used for a variety of purposes. In the field of alumni advancement, some of the ways these methods can be used include:

1. Gauging alumni opinions about important decisions, policies or changes at their alma mater, such as, changing the school’s name, starting a football program or cancelling the printed version of an alumni magazine.
2. Collecting feedback from new alumni on their student experiences.
3. Discussing alumni attitudes toward their alma mater.
4. Following up on questions raised by alumni survey results.

5. Obtaining a better understanding about *why* alumni do or do not participate in programs, attend events or make financial gifts to their alma mater.

These different uses are similar to those adopted by other disciplines (cf. Fern, 2001; Kitzinger & Barbour, 1999; Merton & Kendal, 1946; Vaughn, Schumm, & Sinagub, 1996). This paper describes the use of focus group methods as a follow-up to questions raised by alumni survey results. The open-ended questions are designed to dig deeper into survey results.

### **A Description of the Focus Group Method**

The purpose of the focus group, the open-ended questions that will be asked, as well as the alumni who will be invited to participate will depend on the specific nature of the questions raised by survey results. At the beginning of the focus group, the moderator will state the purpose of the workshop and review the specific survey results that are being addressed. It is very important that alumni understand why the five to seven open-ended questions are being asked, as well as the type of information that is being sought. Once alumni clearly understand the purpose of the focus group, the moderator will review with workshop participants the “Guidelines for Writing Behavioral Statements” and the “Rules for Workshop Participants” (See Appendix A).

Five to seven open-ended questions are typically used by the focus group moderator to facilitate discussion among alumni and generate the specific behavioral examples or critical incident statements that relate to alumni attitudes, feelings and opinions. It is recommended that the five to seven individual questions be written on individual flip chart sheets, and each question be presented and discussed one at a time. The moderator will present the open-ended question, answer any questions alumni may have about the question and then facilitate the group’s discussion of the question. The moderator may ask additional probing questions to clarify what alumni are saying and to help alumni generate additional examples and statements.

The moderator encourages participants to describe experiences that relate to the question being discussed, as well as encourages alumni to comment on what each other is saying. The moderator may ask questions to clarify what alumni have stated, but it is very important that the moderator not try to inject them self into the discussion.

During this discussion, observer(s) will write the behavioral examples and statements that alumni provide on a second flip chart. These should be specific and behavioral in nature, what Flanagan (1954) refers to as “Critical Incident Statements”.

The observer will use tape to hang each question on the wall. Next to the question are hung the related behavioral examples and critical incident statements alumni generated.

Each question is discussed one at a time, until no new behavioral examples or statements are being generated by the group for the question. The individual open-ended questions and the behavioral examples that relate to each question are taped to the walls around the room.

After sufficient behavioral examples have been generated for each question, the moderator assists alumni in identifying the variables that relate to each of the behavioral examples taped around the room. Participants review the behavioral statements that are hanging on the walls and identify the variables that relate to each example or statement. As these variables are identified, the moderator or observer will write these variables on individual flip chart sheets. The moderator then works with participants to develop a definition for each variable, and these definitions are written on the flip chart sheet alongside the variable. The flip chart sheets on which the variables and definitions are written are taped to the wall.

Workshop participants will use these variables to code the individual examples and statements hung around the room. Alumni will identify the individual variables that relate to each example or statement hung around

the room. A single example or statement may relate to more than one variable.

As the written statements are being coded, it is very likely that additional examples will be generated, and some statements edited, deleted or combined with other statements. Similarly, variables may be added, edited, deleted or combined with other variables. The coding process can be very dynamic. Keep in mind that what you want to obtain from focus group participants is a list of variables and the behavioral examples or critical incident statements that relate to each variable.

The focus group method involves workshop participants in generating behavioral examples and statements, identifying the variables that relate to each statement, developing definitions for these variables and identifying the variable(s) that relate to each individual statement. At the completion of the focus group, the moderator will have documented the variables, their definitions and the behavioral examples that relate to each variable. This feedback is the actionable information schools need to address the questions raised by survey results.

Focus groups will typically last between 1-1/2 to 3 hours, but it is important to keep this schedule flexible. It is important that the focus group have a clearly stated purpose. We find it easiest to show participants the actual survey results - the tables, charts and written comments related to the questions raised by survey results. This allows alumni to see the actual data that is driving the questions we will ask.

The open-ended questions guide the discussion among workshop participants and help alumni generate the behavioral examples and statements. It is important to stay focused on obtaining specific behavioral examples that relate to alumni experiences, attitudes, feelings and opinions.

Focus group methods should support an open and energetic discussion of the open-ended questions by workshop participants. Alumni should feel that their opinions are valued, and the questions asked should be important

to both the school and alumni. When focus group methods are done correctly, these methods can obtain much actionable information for schools, and offer alumni a very meaningful opportunity to become engaged with their alma mater.

## **Open-Ended Questions**

When focus groups are used as a follow-up to alumni surveys, the purpose is to obtain a better understanding of survey results – to dig deeper into the data or to answer questions that were raised by survey results. The goal of the open-ended question is to stimulate discussion among alumni that will generate behavioral examples and statements that relate to the question being discussed. The specific nature of these questions will depend on the issues raised by survey results. Usually, five to seven open-ended questions are all that is needed to gain insight into any single issue raised by alumni survey results.

The five to seven open-ended questions should be introduced with a brief presentation of relevant survey results, followed by a more general open-ended question about *why* alumni feel this way. The more general open-ended question(s) are followed by questions that are more specific. The open-ended questions are arranged in a sequence that will be comfortable for alumni, moving from the general to the specific, easy to challenging or positive to negative. Be clear and concise in the questions you ask alumni. These questions are driven by your survey results.

It is important to remain flexible and to maintain a relaxed environment for the focus group. The discussion among alumni will help participants explore and clarify their experiences, attitudes, feelings and opinions. This discussion may also generate new questions or take a different direction. It is important to keep this discussion focused on answering the questions raised by the alumni survey results. Keep it focused on the tables, charts and written feedback that you presented at the beginning of the workshop. Be sure to document any new questions that are discussed, by writing

them on a separate flip chart sheet and taping the question to the wall. Be flexible and pay attention to what alumni do and say.

Example 1 lists seven open-ended questions that were initially developed to generate discussion about the attitudes of Black/African-American alumni at XYZ University. Survey results had reported ethnic differences in the extent to which alumni felt a “sense of belonging” to the campus community. Black/African-American alumni had reported a greater sense of belonging than other alumni groups, and these ratings were highest for Black/African-American alumni from XYZ University’s Miami campus.

### **Example 1:**

**Statement of Alumni Survey Results:** A significant finding of XYZ’s Alumni Survey was that Black/African-American alumni had very positive attitudes about their student experience; they truly felt a part of the campus community. This “sense of belonging” was much greater for Black/African-American alumni than it was for any other ethnic group. It was most significant for Black/African-American alumni from the Miami campus.

(Workshop participants were shown the tables, charts and written comments from the alumni survey that supported the above statement.)

### **Open-Ended Questions:**

(Write these individual questions on separate flip chart pages and discuss each question one at a time.)

1. Can you tell me about your student experience on XYZ University’s Miami campus? What do you think the Miami campus did exceptionally well? What stands out about your time on campus?
2. Tell us about the faculty you had. What made the good faculty exceptional?
3. Tell us about the campus. Where did students meet and socialize? What did students do for fun?

4. Where could things have been better? What could have been done to improve your campus experience?
5. How did the University, administration and staff treat you? What did you like? What improvements can be made?
6. What recommendations would you make for improving the sense of community on the Miami campus? What things do you want to remain the same?
7. Why do you think Black/African-American alumni from the Miami campus reported feeling a greater sense of belonging that did other ethnic groups on any of the other campuses?

When more than one focus group is being conducted, moderators will use the information that is obtained in previous focus groups to better understand survey results, as well as to shape the questions asked in subsequent groups. These questions may remain the same, or they may change, based on the feedback that is obtained in previous focus groups.

The moderator should not share with alumni any feedback that was obtained in earlier focus groups. It is important to keep these samples as independent as possible.

In the previous example, where Black/African-American alumni from XYZ University felt more a part of the campus community than did other ethnic groups, initial focus groups identified that the University had not offered the student services, programs, activities or organizations to Black/African American alumni that they wanted, were use to, interested in or needed. Subsequent focus groups were directed at identifying the student services, social activities and campus life that would help Black/African American alumni feel more a part of the campus community. We were interested in describing the programs, organizations and activities that these alumni had developed, planned and attended as part of the campus life that they had created for themselves.

Example 2 shows how the feedback obtained in earlier workshops changed the questions we asked in subsequent workshops.

## **Example 2:**

**Statement of Alumni Survey Results:** A significant finding of XYZ's alumni survey was that Black/African-American alumni had very positive attitudes about their student experience; they truly felt a part of the campus community. This "sense of belonging" was much greater for Black/African-American alumni than it was for other ethnic groups. It was most significant for Black/African-American alumni from the Miami campus.

(Workshop participants were shown the tables, charts and written comments from the alumni survey that supported the above statement.)

## **Open-Ended Questions:**

(Write these individual questions on separate flip chart pages and discuss each question one at a time.)

1. What did the Miami campus do to help you feel a part of the campus?
2. What could the campus have done or done better to help you feel more a part of the campus community?
3. As students, what did you do to have fun and socialize? Tell us about the events you planned, things you did or people with whom you got together.
4. What recommendations would you make for improving the sense of community of Black/African American alumni on XYZ University's Miami campus?
5. Why do you think Black/African American alumni from the Miami campus reported feeling a greater sense of belonging that did other ethnic groups on any of the other campuses? What did you do differently?
6. What did Black/African American alumni from XYZ University's Miami campus do to create a campus life for themselves?

## **Role of the Moderator**

The moderator is vital to the success of any focus group. The moderator insures that participants attend the workshop. Letters, emails and telephone calls should be used to remind alumni to attend. Participants should be informed that the focus group discussions will last no longer than three hours, and told how important their participation is.

At the beginning of the focus group, the moderator needs to establish rapport by thanking participants for coming, and directing them to their nametags and any refreshments that are being served. The moderator may also point to any gifts the school has brought for alumni (e.g. hats, coffee mugs, notepapers, t-shirts, mouse pads, etc). The moderator will then introduce workshop participants.

It is the moderator's responsibility to insure that the workshop and discussions flow smoothly. At the beginning of the focus group, the moderator will state the workshop's purpose, instruct participants on writing behavioral examples and review the rules for workshop participants. (See Appendix A)

During the workshop, the moderator encourages all alumni to discuss their experiences, attitudes, feelings and opinions as they relate to the questions being discussed. The moderator insures that alumni know that what they may say is neither right nor wrong, and that it is okay to disagree with what other alumni say. The primary purpose of the moderator is to facilitate an energetic and open discussion among workshop participants, to use the open-ended questions to guide and direct this discussion and to help alumni generate behavioral examples and critical incident statements.

The moderator must be able to tactfully deal with challenging participants. Here are some examples of the personalities moderators might encounter, as well as some effective strategies for handling these individuals:

1. **Self-appointed expert** - "Thank you. What do other people think?"
2. **Dominator** - "Let's have some other comments."

3. **Rambler** - Stop eye contact; look at your watch; jump in at their inhale.
4. **Shy participant** - Make eye contact; call on them; smile at them.
5. **Quiet participant** - Ask them to repeat their response more loudly.
6. **Complainer** - "Thank you. What have other alumni experienced?"

Moderators need to be very skilled at handling inappropriate or ineffective behaviors. While you want to support an open discussion among participants, moderators need to also insure that all participants are involved in this discussion and that no single alum dominates this discussion. Most importantly, moderators need to keep this discussion focused on the questions raised by survey results.

The moderator should have no real stake in the workshop's outcome. Most scholars agree that moderators are not expected to be experts in the topics being discussed; and if they are, it is important that they do not insert their opinions into this discussion (Baker & Hinton, 1999; Krueger, 1998; Vaughn, Schumm, & Sinagub, 1996). Moderators should not defend what alumni say or try to persuade participants in one way or another. Not having an agenda or stake in the workshop's outcome makes it easier to claim that the workshop's results are both objective and accurate. For this reason, it is generally recommended that the moderator be someone outside of the alumni advancement function, school or alumni community. At a minimum, alumni need to believe that the moderator is fair, objective and only interested in obtaining their feedback.

When notes are being written, or videos or audiotapes used, the moderator needs to explain to alumni that their comments will be kept completely anonymous. The moderator must inform workshop participants that no names will be associated with anything that is discussed in the focus group.

At the completion of the workshop, the moderator should summarize alumni feedback, thank alumni for their time, assure them that their feedback has been heard and remind them that what they said will be kept completely anonymous. The moderator then reviews this feedback, develops a written report and shares this feedback with the University.

## **Role of the Observer(s)**

While there is merit to video recording focus groups (nonverbal communication can be easily missed otherwise), this is probably inappropriate for most alumni groups. Videotaping is extremely invasive, and many alumni may not be eager to share their comments and concerns, if they see a camera in the room and know that their every movement is going to be captured. An audio recorder is much less intrusive and less likely to stifle discussion, but even this is probably overkill for alumni. If video or audio recorders are used, two recorders should be used in case one fails. Most importantly, alumni must be informed that they are being videotaped or recorded.

When focus group methods are used with alumni, we recommend that flip charts be used to record the behavioral examples that alumni discussions generate. The observer will write down the examples and statements that alumni generate on a flip chart sheet, and do this in full view of all workshop participants. This method is much less intrusive, and it keeps alumni involved in the process and focused on the task at hand, which is generating behavioral examples or critical incident statements.

The observer(s) also writes the variables and their definitions on the flip chart sheets. As workshop participants code the individual behavioral statements that hang around the room, the observer will highlight the statement with a colored marker and/or write the relevant variable code alongside the example. Each color and/or code represents a single variable. More than one variable can relate to any single statement.

## **Generate Behavioral Examples & Critical Incident Statements**

At the beginning of the focus group, alumni will be instructed on writing behavioral examples and critical incident statements (Flanagan, 1954). These examples or statements should describe:

1. The **context** of the behavior.

2. **Who** performed the behavior?
3. The **behavior**.
4. **Who** this behavior affected?
5. How did this make the person **feel**?
6. What was the **outcome** or **consequence** of this behavior?

When the focus group method is used to explore alumni attitudes, the objective is to obtain a description of the specific situation, incident or behavior that positively or negatively affected alumni attitudes, feelings or opinions. This might relate to how they were treated by faculty or staff, school policies or relationships with classmates and friends. It can relate to an internship that was performed, a specific course they took or their relationship with their alma mater since graduation. The incidents that are generated typically represent very significant experiences for alumni. They may be positive or negative experiences, but they are significant and what alumni recall when they talk about their alma mater.

When focus group methods are used to better understand alumni interest in participating programs and attending events, the type of feedback that is likely to be obtained will be somewhat different. In this situation, the goal of the method is to determine *why* alumni do or do not participate in these programs or attend these events. The purpose is to identify what motivates alumni to participate or not participate in these programs and events. What are the basic needs or interests that these events do or do not satisfy? Discussions may result in descriptions of the types of programs, events and activities in which alumni want to participate, but it is also important for this discussion to give some insight into why alumni do or do not want to participate in these different programs, events and activities.

When generating behavioral examples, participants will likely not start out giving you exactly what you need. Initial examples may be general in nature and fail to describe the specific behaviors that defined the experience, incident or situation. The moderator will help alumni describe these experiences in greater detail. Similarly, when you are trying to understand why alumni do or do not participate, workshop participants may

not start off providing sufficient detail for the school to truly understand an alumni's decision to attend an event or participate in giving. They may simply state that they do not participate or do not want to attend, but be able to describe why they do or do not participate. The moderator will help alumni describe the experiences, incidents, feelings and beliefs that relate to these decisions.

It is the moderator's responsibility to help alumni generate specific behavioral examples out of these more general statements. While schools may be interested in alumni feelings and opinions, they are much more interested in identifying the specific types of experiences that cause alumni to feel a certain way or hold one opinion or another. These specific behavioral examples represent the actionable information that schools can use to improve student and alumni experiences.

Some of these behavioral examples or statements will be based on the experience of a single alumnus. These behavioral examples are likely to be rich in detail. However, in most cases, these behavioral examples will be an aggregate of what individual alumni experienced. They are actually group level data that result from the discussions among alumni. These examples represent an amalgamation of the comments made by individual alumni. They may be less specific, but the moderator should be able to obtain the detail that is needed.

Example 3 presents an open-ended question and the behavioral examples that alumni might generate in response to this question.

### **Example 3:**

**Open-Ended Question:** One of the results from the XYZ Alumni Survey was that many of our Black/African-American alumni felt very good about their student experience and stated they felt a part of the campus community. This finding was significant for our Miami campus. Can you tell us about your experience as a student on our Miami campus? What made you feel a part of this campus community?

## **Behavioral Examples:**

*Faculty were always available to help. In between classes, their doors were open, and you could go in to talk about assignments, lectures, internships or just talk. I received some of my best advice from faculty during these little talks. It made me feel a part of the department and helped me become a much better student.*

*I always enjoyed meeting classmates and friends in the quad. It was convenient, everyone was there and it was the place to make plans to get together with friends later. The quad was really the heart of our campus community. You felt a part of the campus when you were there.*

*I was staying on campus over the holidays, as it was too expensive for me to travel home. One of my professors invited me to have dinner with their family, and this really made me feel good. I felt like I was really part of the campus community.*

*As an international student, I had quite a few adjustments to make when I arrived on campus. XYZ went out of their way to help me adjust. They introduced me to faculty and familiarized me with the student organizations, clubs and activities that existed on campus. The staff from admissions, student services and housing really went out of their way to make my adjustment easy. This made me feel a part of the campus community, and I have always remembered how nice they were to me.*

## **Code Behavioral Examples**

Alumni will use the variables they identified to code the behavioral examples and critical incident statements that now hang on the walls. Each example or statement is coded by alumni to identify the variables that relate to it. The moderator facilitates this coding process. The behavioral

examples, variables and definitions will have been taped to the walls for all participants to see.

The moderator helps alumni identify and describe the variable(s) that relate to each behavioral example or statement. Colored highlighters can be used to highlight the content that relates to any single variable. An abbreviation for the variable can be written alongside the example or statement to which it relates. The colored highlighters and variable abbreviations are used to code the variables that relate to each example. More than one variable can relate to any individual statement.

As the coding process evolves, definitions for variables may change. Additional variables may be identified, variables that have few examples relating to them may be deleted, and some variables may be more broadly defined to accommodate examples from these deleted variables. Additional examples might be generated, and these may relate to variables not already hanging on the walls. Write these additional variables and behavioral examples on a flip chart sheets and hang these sheets on the wall. Continue the coding process until you have coded all the variables that relate to each behavioral example or statement. This coding process is analogous to the method of constant comparison (See Glaser & Strauss, 1967). The moderator and alumni continuously compare the variables and behavioral examples they have generated. The coding process continues until the group is generating no new variables, behavioral examples or critical incident statements, and all statements have been coded.

### **Recruit Alumni to Participate – The Sample**

Most focus groups target a specific sample (Miles & Huberman, 1984). Participants are selected based on their ability to discuss or provide information related to the five to seven open-ended questions that will be discussed. For instance, in the two examples we presented earlier, we were interested in why Black/African American alumni felt a “greater sense of belonging” than did other ethnic groups. This “sense of belonging” was greatest for Black/African American alumni from XYZ University’s Miami

campus. We conducted several focus groups with alumni from the Miami campus, as well as focus groups with Black/African American alumni from the schools other three campuses. These were the people who had firsthand knowledge regarding the questions raised by our alumni survey results.

Focus groups are typically comprised of 4 to 12 individuals (Brown, 1999; Lindlof, 1995; Kitzinger & Barbour, 1999; Krueger, 1998b; and Green & Hart, 1999). We recommend that seven to fifteen alumni be involved. The group needs to be large enough to generate a rich discussion among alumni, but not so large that some alumni feel left out of this discussion.

Most researchers prefer a relatively homogeneous group with the common thread being the issues being discussed (Vaughn, Schumm, & Sinagub, 1996). It is believed that having too many different voices can detract from the method's overall purpose. Workshop participants should be a relatively homogeneous group of strangers; people who are familiar with the issues being addressed, but not necessarily each other.

It is important to consider whether or not your focus group participants are likely to know each other or be complete strangers. The degree of familiarity unquestionably affects group discussions. Most researchers prefer participants to be unfamiliar with one and other to prevent these dynamics from influencing the discussion. However, when these methods are used with groups of alumni leaders, alumni chapters or alumni advancement staff, participants will likely know each other to some extent. These interpersonal relationships can affect the openness of the discussion. The moderator must be able to manage these dynamics. You do not want one vocal alumnus to run the group or lead the discussion. Keep the discussion open and involve all alumni.

The specific nature of the sample, that is, who you will recruit to participate, will depend on the questions you plan to ask. If the questions being discussed pertain to a specific campus, program or group of students, alumni will need to be members of these different alumni groups. When these questions address issues that affect the entire alumni community,

such as changing the school's name or starting a football program, data can be collected from the school's general alumni population. In either case, participants should have first-hand knowledge about the questions you plan to discuss. Identify the key demographical variables that you will use to recruit alumni, and use these demographics to prepare a screening questionnaire that will guide your recruitment of alumni participants. Go to your archival records and use the questionnaire to identify the alumni whom you might want to ask to participate.

A balance between the need to have a sufficient number of participants for a lively discussion and the danger of an overwhelming group size must be achieved. We recommend seven to fifteen participants when involving alumni. We also recommend that you invite more alumni than you will need. In spite of your best efforts, some alumni will fail to attend the event. Think of inviting an extra three to five alumni to each workshop.

When focus group methods are used with alumni boards, alumni chapters or other alumni affinity group, the number of participants may go well beyond fifteen participants. You will not want to exclude anyone from the process, so in these situations, we recommend that two observers and a skilled moderator is used.

For any single set of questions, multiple focus groups will likely be conducted. You will want to confirm your initial findings on subsequent samples of alumni. For any set of questions, three to five focus groups should suffice. In most situations, you will use the same set of questions on these different groups. However, if these questions change, evolve or start to take a different direction, you might consider conducting additional focus groups.

Probably the best approach to determining how many focus groups will be needed is to continue conducting these groups until no new variables, behavioral examples or critical incident statements are being generated by workshop participants or until you have sufficient insight into the questions raised by survey results. When no new information is being obtained, and a thorough understanding of the issues has been developed, the focus

groups can stop. This process is similar to the constant comparative technique used in grounded theory (See Glaser & Strauss, 1967; Strauss & Corbin, 1998). Again, three to five focus groups should be sufficient for most questions raised by alumni survey results.

## **Informed Consent**

At a minimum, all focus group participants should complete a consent form (See Appendix A). When focus groups involve alumni, and a college or university is conducting the workshops, these methods must be approved by the school's Human Subjects Committee.

## **Data Analysis**

Immediately following the focus group, alumni feedback should be summarized. Because people can forget important details, it is highly recommended that any observations or notes made by the moderator or observer(s) be documented and summarized. The flip chart sheets will contain the coded behavioral examples, variables and definitions that alumni generated. Keep these in together.

Use a word processing program to list the variables, their definitions and the different behavioral examples and critical incident statements that relate to each variable. Individual examples can be listed under more than one variable. This document will be an appendix to your report.

List the recommendations that alumni made, and identify the variables that relate to these recommendations.

Document the relevant demographic variables for all alumni participants, for example, gender, ethnicity, major or class year. Develop a description of the alumni sample who participated in the focus group(s).

## **Written Report**

When multiple focus groups are conducted for a single set of questions or issue, the written report will summarize the findings of these different groups. The written report should state the purpose for conducting the focus groups, describe the sample and list the open-ended questions that were used. The results should list the variables, their definitions and the behavioral examples related to each variable. It will list the recommendations made by alumni, and identify the variables that relate to these recommendations. (See Appendix A)

## **Garnish Institutional Support**

It is important to garnish institutional support before you consider conducting an alumni survey or focus group. These methods frequently obtain feedback that will go well beyond the responsibilities of any alumni advancement function. Alumni will talk about the quality of academic programs, academic standards and the quality of the instruction they received. Alumni will write about the student services, campus life or the perceived value of their degree. Alumni feedback may address University policies, procedures and practices; how students were treated by staff or decisions made by school leadership. The feedback that is obtained frequently goes well beyond the responsibilities of any alumni advancement function.

Because of this, it is extremely important to garnish institutional support before conducting any alumni survey or subsequent focus groups. You will need this support to be able to effectively put your survey results or focus group feedback to work. Administrators need to be prepared to listen to and put to use the feedback alumni provide.

## **Theoretical Models**

Focus groups are easier to conduct when these methods are theory driven. A theoretical framework will drive the design of the survey, the development of focus group questions and the interpretation of results. If the survey evaluated alumni attitudes, it was probably designed with some sort of theory in mind regarding the types of variables that affect alumni attitudes. If the purpose was to evaluate alumni interests in participating in programs and events, then available programming and the variables believed to motivate alumni to participate will guide the design of the survey and focus group methods.

Figure 1 presents a model of the different variables that we believe affect alumni attitudes. It suggests a process by which alumni become and remain engaged, as well as how these variables relate to differences in alumni giving. The model is based on data we have obtained from alumni surveys, focus groups and interviews. It is one of the theoretical models that we use to interpret the results of the alumni surveys, focus groups and interviews that we perform. It guides the questions we ask, the analyses we perform and how we interpret the results we obtain.

## **Put Your Focus Group Feedback to Work**

Before you begin conducting focus groups, it is important that you have some idea about the type of feedback you are likely to obtain, as well as how you plan to put this feedback to use. It is important that you anticipate the types of feedback you might receive so that you can garnish the support of the departments, services and administrators that are likely to be affected by these results. Obtain institutional support for conducting the focus groups, as well as putting this feedback to work. Think about the time and resources that any recommendations will necessitate and garnish this support.

## Conclusion

Focus groups are very effective as a follow up to alumni surveys. When survey results raise questions, focus groups can be used to dig deeper into the meaning of these results. The behavioral examples or critical incident statements that are generated by workshop participants can provide much insight into *why* alumni have certain attitudes, feelings or opinions. This feedback can also offer considerable insight into *why* alumni do or do not attend events or make gifts. It represents the actionable information that schools need to drive their alumni engagement strategies.

In addition to the valuable information that focus groups provide, these methods can also have a very positive effect on the attitudes of those alumni who participate. Alumni want their feedback to be heard. They want to do important, meaningful work. They want the opportunity to do good things for their alma mater. Focus groups offer alumni these opportunities and communicate to alumni that their feedback is valued. When these methods include your alumni leaders and these individuals are involved in implementing the recommendations that are made, this method can provide a very effective strategy for engaging your high-value alumni.

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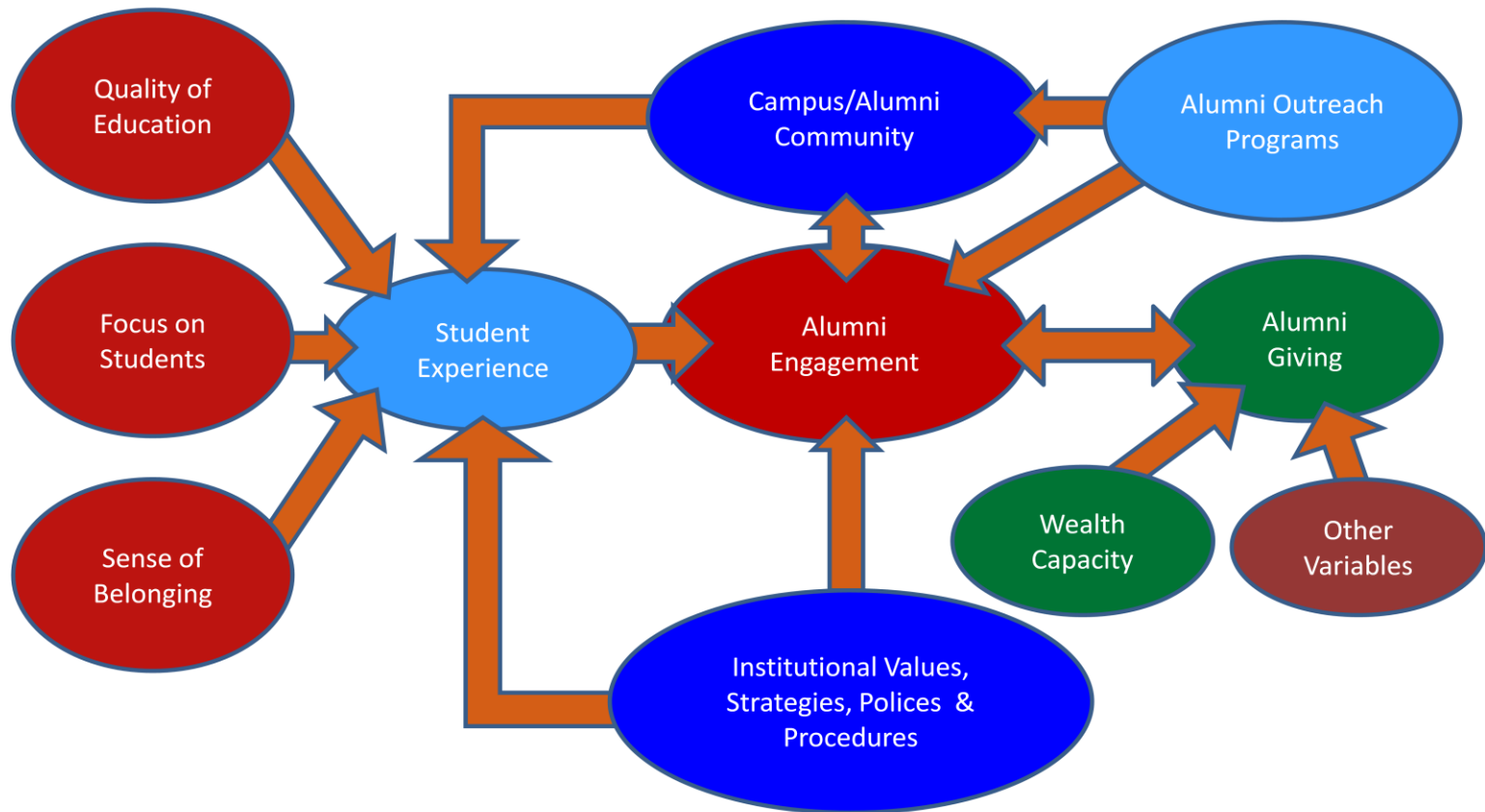
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# Variables Affecting Alumni Engagement



2

Figure 1. A model of the process by which alumni become and remain engaged.

**Appendix A**  
Focus Group Methods  
Guidelines, Checklists & Examples

# Focus Group Methods

## Step-by-Step

### Pre-Workshop Activities

1. Write in clear and specific terms the purpose for conducting the focus group. What questions did survey results raise? What information do you need? Be prepared to present and discuss the specific tables, charts and written comments that related to the questions raised by survey results.
2. Prepare five to seven open-ended questions that relate to the issues raised by survey results. The purpose of these questions is to stimulate discussion among participants.
3. Review the purpose of the focus group, relevant survey results and the open-ended questions that will be asked with the schools executives and the administrators of the departments to be affected to garnish institutional support.
4. Obtain approval from the University Human Subject's Committee.

### Recruit Participants

5. Identify alumni who will provide you with the information you need. They should have experience or knowledge regarding the questions to be asked and willing to participate in the discussion. Participants may have a common background, but you should avoid recruiting people who know each other.
6. First, call alumni to ask them to participate.
7. Next, send a letter thanking alumni who agree to participate. You might state the purpose of the focus group session and tell alumni how the results will be used. It should be made clear that individual comments made during the focus group are strictly confidential.
8. Follow up the letter with email(s) and/or a telephone call reminding alumni of the time and place of the focus group.
9. Recruit two to five more alumni than you will need, as some may fail to show.

## **Reserve the Meeting Room**

10. Reserve a comfortable meeting room. Arrange the seating in a U-shape format so participants can see each other and the moderator can walk among the alumni.
11. Place the flip chart at the top of the U-shaped seating.
12. Reserve refreshments and place them in the back of the room.
13. Place alumni gifts on a table that alumni will see.

## **Introduction**

14. Meet and greet workshop participants at the door.
15. Direct them to their nametags, the refreshments and gifts.
16. Once all participants have arrived, asked them to be seated, and mention the gifts from the University.
17. Have the participants introduce themselves.
18. State the purpose of the focus group.
19. Assure participants that no names will be associated with anything they say and that their feedback will remain anonymous.
20. Have all alumni sign the consent form.

## **Collect Behavioral Examples and Critical Incident Statements**

21. Review the rules for focus group participants.
22. Review the guidelines for writing behavioral examples.
23. Review the tables, charts and written comments from the alumni survey that formulates the basis of the open-ended questions.
24. Direct participant's attention to the flip chart, and reveal the first open-ended question. Review this question and make sure everyone understands what is being asked. (You will obtain behavioral examples or critical incident statements for each question, one at a time.)
25. Tape the question to the wall.
26. Remind participants that you want them to discuss this question and generate behavioral examples or statements that relate to their experiences, attitudes, feelings or opinions. The moderator should encourage and facilitate discussion among participants. The moderator will work with alumni to clarify what is being written on the flip chart sheets, but

it is important that the moderator not express an opinion and remains neutral.

27. Observer(s) will write down the behavioral examples on flip chart sheets.
28. As these sheets are filled, they are taped on the wall beside the question to which they relate.
29. Behavioral statements are obtained until alumni can generate no new behavioral examples or statements.
30. At this point, the next open-ended question is revealed on the flip chart and steps 24 through 30 are repeated for each of the remaining open-ended questions.
31. The final open-ended question will elicit recommendations from the group regarding the issues discussed.

### **Code the Behavioral Examples**

32. Taped around the room will be the open-ended questions and the behavioral examples or critical incident statements generated for each question.
33. Review the behavioral examples taped to the walls around the room.
34. Identify the individual variables that relate to these different behavioral examples. Write each variable on a flip chart sheet.
35. Develop a definition for each of variable, and write these definitions on the flip chart sheets. Tape these sheets to the wall.
36. Select a colored highlighter and develop a code for each variable.
37. Use the variables to code the text of all behavioral examples and statements. When more than one variable applies to any single statement, code the example for all relevant variables. Use the colored highlighters and codes you developed earlier.
38. Delete variables that are not often used. Add a variable if this is necessary, or combine two variables into a single variable.
39. Develop new variables, definitions or behavioral examples as needed.

### **At the End of the Focus Group**

40. Be sure that you have recorded the important demographic variables on focus group participants so that you will later be able to describe the sample on which this feedback was obtained.

41. Thank alumni for their participation.
42. Write down any notes or observations.
43. Take down from the walls:
  - a. The flip chart sheets with the coded behavioral examples and critical incident statements.
  - b. The flip chart sheets with the underlying variables, definitions and codes.
  - c. Keep the behavioral examples and their related open-ended questions together.

### **Data Analysis**

44. Use MS Word to edit, revise and document the individual behavioral statements or examples obtained from workshop participants. You will want to do some editing as you transcribe the examples from the flip chart sheets into a word processing program, but try to keep the basic content of what the group said intact.
45. Use MS Word to list the different underlying variables and their definitions.
46. List the different behavioral examples under each variable to which they relate. If individual behavioral examples or statements relate to more than one variable, lists these statements under the different variables. (Include this listing as an Appendix to your report.)

### **Summarize Results**

47. Describe the alumni sample on which this feedback was obtained. What are the important demographic variables?
48. Summarize the variables participants discussed in response to the open-ended questions. What were the underlying themes? Describe these variables.
49. For each variable, list one or two behavioral examples.
50. List the recommendations made by alumni. What do these recommendations address? What are the underlying themes?
51. For each recommendation list the variables that relate to it.
52. Appendix - List the different behavioral examples under each variable to which they relate.
53. Develop a written report and presentation.

54. If you are conducting more than one focus group on the same issue or topic, you will need to integrate the feedback obtained from these different samples.

### **Share Focus Group Feedback with the University**

55. Be sure to share these results with the relevant departments, administrators and campus groups.
56. Briefly review survey results. (Briefly review the reasons for conducting the focus groups.)
57. Present the feedback obtained from the focus group.
58. Discuss the groups' recommendations and the University's strategy for addressing these issues.

## Focus Group Method Checklist

- Clearly Define the Purpose for Conducting the Focus Group
- Know How You Plan to Use this Feedback
- Garnish Institutional Support
- Prepare a Presentation of Relevant Survey Results
- Develop Five to Seven Open-Ended Questions
- Recruit Alumni Participants
- Insure the Necessary Workshop Materials are on Site (Flip Charts, Magic Markers, Masking Tape, Nametags, Gifts, etc.)
- Moderator
- Observer(s)
- Reserve the Meeting Room
- Arrange for Refreshments & Gifts
- Remind Participants of the Workshop
- Develop Report
- Share Results
- Secure the Necessary Resources

# Focus Group Materials Checklist

## Workshop Materials

- 2 Flip Chart Easels
- 2 Flip Chart Note Pads
- 4 Black Wide Tip Magic Markers
- 10 Different Colored Wide Tip Magic Markers or Crayons
- 2 Rolls of Masking Tape
- 2 Note Pads
- 2 Pens
- Scissors
- 25 Nametags
- 2 Felt Tip Black Pens (For the Nametags)
- Notebook Computer with MS Word

## Participant Materials

- 25 Note Pads
- 25 Ball Point Pens
- 25 Alumni Give-A-Ways

## Meeting Location

- Room Reserved
- Tables & Chairs
- University Signage & Branding
- Refreshments

# **EXAMPLE**

## **Focus Group Method Consent Form**

You have been asked to participate in a focus group sponsored by XYZ University (XYZ). The purpose of the focus group is to help XYZ better understand the results of the 2009 XYZ Alumni Survey. Your alma mater will use your feedback to improve how we educate students and relate to alumni.

During the focus group, we want all alumni to be able to participate in the discussion of our open-ended questions. The focus group will allow participating alumni to engage in an honest and open discussion of the issues raised by the XYZ Alumni Survey. You can choose to participate or not participate at any time during the process. There are no right or wrong answers to the focus group questions. Your comments and feedback will remain anonymous; your name will not be associated with anything you say.

Please sign and date this form below. Your signature indicates that you understand the purpose of the focus group and have agreed to participate.

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

## Guidelines for Developing Behavioral Examples & Critical Incident Statements

Behavioral examples or critical incident statements are written statements that describe a specific individual alumni experience. The statement describes a specific behavior, situation or incident that the alumni experienced or observed. This may involve classmates, a faculty member, staff or administrator. It can relate to the schools policies, procedures or institutional culture. It can relate to how alumni have been treated since graduation, or what they perceive to be the value of their degree. These statements frequently describe incidents that relate to alumni attitudes, feelings or opinions. The role of the moderator is to keep the generation of these statements related to the question being asked.

When writing behavioral examples the following rules should be kept in mind:

1. Be specific.
2. Describe the **context** in which the behavior occurred.
3. Tell **who performed the behavior**.
4. Describe the **behavior**.
5. **Who** did the behavior affect?
6. How did this make the person **feel**?
7. What was the **consequence** or **outcome** of the behavior?

As participants discuss the question and related examples among themselves, examples may be edited to include what other participants had experienced. Some examples will be provided by a single participant, others will be an amalgamation of what the group has stated.

All examples should be written on the flip chart. Some may be deleted, combined with other statements as part of the coding process. It is important that all participants feel that what they have to say is valued and respected, and that discussion among participants is encouraged and supported.

# Guidelines for Developing Behavioral Examples

1. Be specific.
2. Describe the **context** in which the behavior occurred.
3. Tell **who performed the behavior**.
4. Describe the **behavior**.
5. **Who** did the behavior affect?
6. How did this make the person **feel**?
7. What was the **consequence** or **outcome** of the behavior?

## Rules for Workshop Participants

1. There is no right or wrong answer.
2. Be polite, courteous and respectful in your treatment of other alumni.
3. Value and respect the opinions of others.
4. Allow individuals the time to complete what they have to say, do not cut people off or talk over other alumni.
5. Encourage other alumni to participate in the discussion.
6. Please participate. Offer your opinion, discuss the opinion of others and provide behavioral examples or statements of what alumni have experienced.
7. What you say is strictly confidential. Our report summarizes what all focus groups have said. Your name will not be associated with anything said in this room.

# Focus Group Method

## Example

### Understanding Attitudes on XYZ's North Miami Campus

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**Purpose** – To help XYZ University understand the attitudes of Black/African-American alumni from the Miami Campus

**Presentation of XYZ Alumni Survey Results** – Present relevant tables, charts and written comments. Present the open-ended questions and discuss any questions workshop participants may have.

#### Open-Ended Questions

1. When you were a XYZ student on the Miami Campus, what did you like best about your student experience? What did XYZ do especially well?
2. Describe the campus community. How did you become involved? What were the organizations, groups, athletic teams or clubs to which you belonged?
3. Where did students congregate? Where did students get together to socialize?
4. What role did faculty play in campus life? What did faculty do to make you feel a part of campus life?
5. How did/do the school, administrators and staff affect your sense of belonging to the campus community?
6. What are your recommendations for improving the Miami campus community?

## Examples of Behavioral Statements

*Faculty were always available to help. In between classes, their doors were open, and you could talk about assignments, lectures, internships or just talk. I received some of my best advice from faculty during these talks. It made me feel a part of the department and helped me become a better student.*

*I always enjoyed meeting classmates and friends in the quad. It was convenient, everyone was there and you could always make plans to get together later. The quad was really the center of our campus community. You could feel the energy when you were there.*

*I was staying on campus over the holidays, as it was too expensive for me to travel home. One of my professors invited me to have dinner with their family. It really made me feel very good. I have always remembered this.*

*As an international student, I had quite a few adjustments to make when I arrived on campus. XYZ went out of its way to help me adjust, meet my faculty and introduce me to some of the student organizations in which I might be interested. The staff from admissions, student services and housing really went out of their way to make my adjustment easy. I have always remembered how nice they were to me. They made it much easier for me to adapt to my new surroundings.*

*I made a number of good friends in my classes and internships. We have stayed in touch and we get together on a regular basis. I look forward to seeing them.*

## Examples of Variables, Codes & Definitions

**Faculty (F)** – Faculty were available for help. They were truly interested in student success and well-being. Faculty gave students individual attention. They mentored students, provided internships and were a big part of the campus community.

**Sense of Belonging (SB)** – Students felt a part of the campus community and were actively involved in campus life. Alumni want to get together with classmates, friends and faculty. Alumni enjoy reading about the University, campus, classmates, alumni and students. Alumni participate in programs and attend events.

**Treatment & Services (TS)** – The University, administrators and staff treat students and alumni fair and with respect. Promises are kept. Staff are focused on customer service.

# Focus Group Report

## Outline

**Purpose** – State the purpose for conducting the focus group. What is the issue being discussed? What questions did survey results raise?

### Method

**Sample** – Describe the sample of alumni who participated in the focus group (Number of participants, class decade, ethnicity, gender, campus, academic program, etc).

**Procedures** – Describe the focus group methods you used and the number of groups facilitated.

**Open-Ended Questions** – List the open-ended questions used to facilitate discussion among alumni.

### Results

1. Identify the variables that relate to the different behavioral examples generated by participants.
2. Provide definitions for these different variables.
3. For each variable, list three to five behavioral examples.
4. Describe the recommendations made by alumni. Identify the variables that relate to these recommendations.

**Summary** - Summarize alumni feedback and recommendations.

### Appendix A

1. List all underlying variables, definitions and all related behavioral examples or critical incident statements.



**Jim Flynn, Ph.D.** is President and founder of **Harford Survey Research** (HSR). HSR provides survey research, data mining and organizational consulting services to colleges, universities, private secondary schools and not-for-profits directed at enhancing engagement and increasing giving. Dr. Flynn has more than 20 years university teaching experience and more than 30 years experience consulting with businesses, industry, utilities, the military, government agencies, healthcare organizations, colleges, universities and not-for-profits. For the past decade Dr. Flynn has been the principle investigator of HSR's research on alumni attitudes, engagement and giving. He has conducted alumni surveys for colleges and universities, and directed HSR's National Alumni Engagement Study.

Dr. Flynn earned his Ph.D. in industrial and organizational psychology at Old Dominion University in Norfolk, Virginia. His areas of expertise include survey research, outcome measurement, program evaluation, strategic planning and organizational design and change. He is a member of the [American Psychological Association](#), the [Society of Industrial and Organizational Psychology](#) and the [Academy of Management](#).

James B. Flynn, Ph.D.

**Harford Survey Research**

410.893.5152

[jbflynnphd@harfordsurveyresearch.com](mailto:jbflynnphd@harfordsurveyresearch.com)

