Interviewing K-12 education experts and elites

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Understanding education experts and elites is crucial in the context of their larger influence on education and the public's greater skepticism and criticism of their work. This paper distinguishes between traditional and expert/elite interviews (EEIs), and highlights strategies for conducting them. Experts and elites have relatively broader influence, more synthesized but less situated knowledge, more embedded professional networks, and less anonymity than the lay public—and interviews need to adjust to these differences. To do so, researchers should consider strategies for (1) access, (2) trust, (3) preparation for interviews, and (4) asking sensitive and awkward questions in contexts of significant power disparities. The article ends with caveats and novel possibilities with using EEIs with traditional interviews, quantitative methods, and network data.

KEYWORDS

education experts, policy elites, school reform, qualitative methods, interviews

1 Introduction

Several factors have recently motivated the study of K-12 education experts and elites: researchers, professors, philanthropists, nonprofit organizational leaders, corporate executives, school board members, and policymakers. First, many top-down educational changes have been driven by these networks of experts and elites with interests in specific school reform agenda like charter schools and teacher education policies (Ferrare and Setari, 2018; Aydarova, 2022). Second, there has been a global expansion and blurring of public-private collaborations as well as research-practice partnerships, many of them led by these powerful individuals like government leaders, education bureaucrats, philanthropists, and researchers (Eddy-Spicer et al., 2020; Lubienski et al., 2022). Third, recent studies have documented Americans' greater skepticism of expertise and heightened criticism of elites (Motta, 2018; Sherman, 2021). Thus, it is crucial to understand the viewpoints of experts and elites, and how these individuals participate in current political struggles in schools as in the case of anti-diversity, anti-critical race theory, and anti-LGBT organizing (Kim, 2021; Mayo, 2022). Finally, the COVID-19 pandemic has encouraged the wider use of virtual interviews, opening access to previously difficult-to-reach informants (Oliffe et al., 2021). Such changes show that interviewing education experts and elites provides an opportunity to understand innovations and inequalities, power and profit, as well as educational change and inertia. Although some research has provided guidance and strategies for interviewing elites in higher education environments, like presidents, provosts, deans and upper-level administration (McClure and McNaughtan, 2021), this current article focuses on methods for the study of elites and experts in K-12 settings.

This paper attempts to synthesize previous literature on conducting expert and elite interviews (EEIs), contextualize these principles for use in the field of education, and offer

practical considerations using examples from the author's experience of interviewing researchers, directors, and organizational leaders. The paper starts with a *definition* of "education experts and elites" and a *distinction* between these interviews and more traditional interviews with students, teachers, and school leaders. It then highlights the practical *strategies* for accessing informants, preparing for the interviews, asking questions in the context of significant power disparities, and gaining feedback to create a fair report. It ends with *caveats* for how EEIs can lead to conflicting perspectives, caricatured depictions, confined research agenda, or unfair criticism; it also shows *novel possibilities* in using EEIs with traditional school interviews, quantitative results, and network data.

Across the paper, I draw on books and peer-reviewed journal articles that have documented how to use expert and/or elite interviews. As many of these are outside education, I supplement these by referring to some previous education research incorporating EEIs (Selwyn, 2013; Walford, 2013; Reckhow et al., 2021) and by referencing my own work interviewing organizations that initiated high school dropout prediction systems called *early warning indicators* (EWIs) in three cities. I interviewed 73 researchers, school coaches, nonprofit leaders, and philanthropic managers across 29 organizations in Chicago, Philadelphia, and New York City. These individuals were chosen for their work in initiating, implementing, and institutionalizing EWIs in the US. They were invited to semi-structured interviews on Zoom, conducted between summer 2021 and winter 2023. By detailing my process, the paper presents issues to consider when doing EEIs. Rather than didactically present "guidelines," I present issues and strategies that researchers can think through in interviewing.

2 Education experts and elites

Studies have documented the difficulty in defining expertise and elite status (Bogner et al., 2009; Rivera, 2016). Experts may be defined through their "on-the-ground" knowledge, professional understanding, or others' recognition of their expertise (Bogner et al., 2009; Meuser and Nagel, 2009). Elites may likewise be defined relative to their financial, social-cultural, organizational, or political position (Harvey, 2011; Khan, 2012). The idea of collapsing these two broad categories into one can be open to critique. However, for the purposes of this paper, the processes for interviewing these individuals can be taken together. In particular, what these two groups share is their being *relative categories*, where their status is distinguished by their relation to knowledge on the one hand and power on the other (Petintseva et al., 2020). In education, these are socially constructed categories where experts tend to have more advanced knowledge in a specific field while elites tend to have relatively broader influence and power—relative to ordinary educational stakeholders like students, teachers, parents, and school leaders.

Education experts do not just obtain more advanced knowledge; they are often recognized formally and institutionally to be bearers of specific professional knowledge. In many cases, expertise is domain-specific where knowledge is directed at a particular aspect like an academic discipline, policy, reform, or method (Tricot and Sweller, 2014). These may be researchers and professors who have formally studied these topics, or coaches and coordinators who have focused practical knowledge on an issue (Woulfin and Rigby, 2017; Farrell et al., 2021). Other markers of expertise include being part of

professional associations, presenting at conferences, having publications on a topic, and receiving grants that show expertise (McGrath et al., 2022).

Education elites are individuals in positions of broader influence and power, whose decisions and actions can have consequences on larger systems in education (Ball, 2008; Walford, 2013). While traditional research on elites have focused on their control and access over financial resources (Khan, 2012), elites in education often include central district or ministry officials, board members, and affluent philanthropists—whose financial situation does not determine or preclude their being considered part of an elite group of "minorities who make decisions on behalf of the majority" (Petintseva et al., 2020, p. 12). Adapted for the present discussion, these elites may be managers, directors, senior leaders, or executives (Harvey, 2011) in government and non-government organizations that have an influence over what happens in schools. Such influence, however, may be resisted or only ceremonially complied on the ground, such that the influence may be broader but the impact less powerful when compared to the people on the frontlines of teaching (Trinidad, 2019).

This paper brings together these two groups not because they function similarly but because the strategies and considerations for interviewing these individuals have important similarities (Van Audenhove and Donders, 2019). The relative privilege and prominence of both experts and elites can lead to significant power disparities between the researcher and the researched (Berry, 2002). There is also greater difficulty in separating experts and elites because of recent efforts at integrating advocacy nonprofits, research organizations, philanthropic funders, and policy-making state institutions (Scott et al., 2009; DeBray et al., 2020; Reckhow et al., 2021). Finally, interviews with these "powerful" agents come in contrast to traditional interviews with students, teachers, and school leaders that draw on a different set of power (Smith, 2006).

3 Traditional vs. expert/elite interviews

Qualitative studies of schools have often focused on the experiences of students, teachers, parents, and school leaders. Many general strategies to ensure high-quality interviews apply to EEIs such as having sustained exposure to interviewees, exhibiting cognitive empathy, and attending to heterogeneity among informants (Small and Calarco, 2022). Moreover, interviews—whether of students, teachers, experts, or elites—need the explicit intention and action of the researcher to uncover knowledge, process, practice, or perception (Powney and Watts, 2018). But interviewing experts and elites has key distinctions with other interviews because of these informants' relative power, knowledge position, public persona, and professional embeddedness (see Figure 1).

In terms of *power*, experts and elites have a broader influence because their studies and policies have repercussions that span more than just one classroom or one school, albeit less direct than teachers and principals who have more direct influence over students. Because of this, EEIs are often concerned with understanding the nature of power, how individuals achieve it, and how they protect it (Walford, 2013). This becomes difficult when a researcher has relatively less power, especially as difficulties arise with asking awkward questions, controlling the research/ interview, or having questions deflected (Selwyn, 2013). In my own research, this power disparity was apparent

Traditional Interviews

Direct, unmediated influence
Teachers/leaders affect students

More situated knowledge
(e.g., teaching experiences)

Less identifiable
Informants/schools are in big pool;
easier to anonymize informants

Loose Connections
Moderately affected by networks

Expert/Elite Interviews

"Broader," mediated influence
Policies affect bigger population

More synthesized knowledge
(e.g., policy effects/nuances)

More publicly known
Informants/orgs are public figures;
harder to anonymize informants

Professional embeddedness
Leaders highlight interconnections

FIGURE 1
Traditional interviews vs. expert/elite interviews.

as I was interviewing experts with significantly more years of research experience than I had, and leaders whose work started in the 1990s and 2000s. Nonetheless, some strategies (detailed later) were helpful to reduce power distance between the interviewer and the informant.

Knowledge is also different as teachers and school leaders have more situated knowledge while experts and elites have more synthesized knowledge. Thus, the questions appropriate for EEIs are those that involve broader perspectives, longer timeframes, and wider retrospective reflections rather than questions about how things are happening on the ground. Some suggest that these interviews can be efficient during the exploration part of a research project, as researchers need to know the general context and environment (Bogner et al., 2009). Information from experts and elites also help with understanding the intention, interpretation, and intuition behind policies (Reckhow et al., 2021). But these informants may be limited in their perspective, either because of an idealized version of the policy, because of their personal stakes and interests to paint a good picture, or because of simple ignorance with how things are happening on the ground (Berry, 2002). With my research on dropout prediction systems, my informants were often able to detail the trends in on-track and graduation rates as well as the key historical turning points and alliances for the initiative. However, these leaders were less informed about the specificities of how these tools were used or not used in schools.

In contrast to teachers and school leaders, many experts and elites are *public figures* whose public persona can provide important advantages and disadvantages for the research. On one side, these individuals' actions, decisions, and research have been documented elsewhere such that the purpose of the interview is not to gain that

information but to deepen understanding of them (Lancaster, 2017). For example, many of my informants were the researchers who discovered the predictiveness of ninth-grade performance on high school graduation and have extensively written about them (Allensworth and Easton, 2005; Balfanz et al., 2007; Balfanz and Byrnes, 2019). Thus, I had to approach the interviews by not repeating what they had already said elsewhere. Rather, I must uncover what were not mentioned in their research such as the genesis of their discovery, the political struggles, or the collaborations needed to institutionalize it.

On the other side, the public nature of these experts and elites made it difficult for these individuals and organizations to be anonymized as details may easily identify them (Ellersgaard et al., 2022). In the case of my study, education researchers knew this work that stemmed from organizations in Philadelphia and Chicago, leading me to request them to be identified. Similarly, Fuller's (2022) analysis of pluralist reforms in Los Angeles identified the organizations and individuals who were leading these efforts. In contrast, Tompkins-Stange's (2016) research on four large foundations identified the specific philanthropies but anonymized those interviewed. Thus, researchers may have different considerations for anonymity of often public personas, depending on the purpose of their study.

Education experts and elites are deeply *embedded and connected* with each other. Although social networks are critical resources for spreading practices among teachers and school leaders (Frank et al., 2004; Coburn and Russell, 2008), the level of dependence of elites, experts, and organizations on each other is key to change and influence (Ball, 2008; Scott and Jabbar, 2014). As an example in my research, individuals kept referencing other people they worked with.

During one interview in particular, a research director in New York City spoke about individuals at the city's department of education, a school support organization that developed "the very best… [data] tools," a research consortium in Chicago, and an initiative with community-based organizations in the city. Such interconnections were also seen in other studies, such as with Ozga and Gewirtz (2005, p. 133) who detailed that,

> [A]ll our interviewees talked about one another, introduced us to former colleagues and told us about significant others. (The interconnectedness of the people we studied was at one and the same time an aid to the research process and a finding of the study. We are aware that it may have enhanced the impression of community and social solidarity.)

In interviews with experts and elites, particularly among individuals working on similar reform efforts, such embedded relationships can help uncover political and economic dynamics as well as collaborative and conflictual affairs. Thus, interviewing them can aim to surface the connectedness and networked complexities of these experts and elites.

4 Strategies for expert and elite interviews

Coming from EEI's difference with traditional interviews, researchers need to consider a number of factors when interviewing education experts and elites. To synthesize these, I elaborate on four key considerations and strategies for conducting EEIs: (1) access and trust, (2) preparation and tailoring, (3) interviewing in the context of power differences, and (4) fairness and feedback (see Figure 2).

At the start of their study, researchers need to determine if they would gain *access* to these organizations, and subsequently, how they can gain the *trust* of individuals (Harvey, 2011; Walford, 2013). In choosing individuals and organizations, researchers may consult previous studies and search engines to see which organizations or experts will be best able to answer their questions. Similar to studies of schools, the approval of organizational gatekeepers is important because researchers have to first reach out to leaders or managers in these organizations. Researchers can increase their chances of obtaining interviews by positioning themselves variably across different elites such as a policy scholar for political elites, a neutral stakeholder for economic elites, or an informed analyst for professional

FIGURE 2
Considerations for expert and elite interviews.

elites (Li, 2022). Once approval is obtained, researchers may ask for suggestions of other key informants with expertise or knowledge on the topic (Goldstein, 2002). Part of gaining trust is being transparent about what the study is, what the focus will be, how data will be used, where results will be published, and whether the information will be attributed to the individual, organization, or both (Harvey, 2011). Such process may happen through e-mail correspondences or through conversations before the formal interview.

In my research on early warning indicators (EWIs), I reached out to organizational leaders in the places that have initially documented this research: the University of Chicago Consortium on School Research, Johns Hopkins University's Everyone Graduates Center, and New York University's Research Alliance. After securing access from these leaders, I spoke to them and their suggested informants who then subsequently connected me with other informants within and beyond the original organizations (see earlier paragraph on professional embeddedness). To gain their trust, I sent informants a one-page document detailing the study's purpose and requesting their participation. Before the start of the interview, I introduced myself and the research, and asked explicitly for three things: (1) if they were willing to participate, (2) if they were willing for the interview to be recorded for accuracy, and (3) an indication that I will ask them at the end of the interview if they were willing for quotes to be attributed to them and if they wanted to take specific quotes off the record. At the end of the interview, I asked these two questions on attribution and quotation. One asked to remain anonymous and another asked for certain aspects to be taken off the record. I ended the meeting with an assurance that any written product will be shared with the informant before being made public. Such efforts are not only meant to establish trust but also do accurate reporting.

A second aspect to consider is the *preparation* for interviews, in order to tailor specific questions. Although interviews with students, teachers and school leaders need preparation, the researcher conducting EEIs need to perform due diligence in knowing as much about the expert or elite they will be interviewing. These individuals often have public profiles on organizational websites, LinkedIn, Google Scholar, or their professional associations. They may also have written a number of studies and journal articles. It is crucial for the interviewers to do their homework to ask questions that have not already been answered in previous instances. Moreover, questions may be tailored based on the informant's expertise, position, or role (Berry, 2002), and may be more directed to process, intention, challenges, or other unseen aspects of policy and practice (Selwyn, 2013). Rather than ask for the outcomes or effects of a program—something often already answered in research publications—the interviewer may ask about process and perception, about details, stories, and motives for actions and inactions (Small and Calarco, 2022).

In my interview with researchers, coaches, and other leaders, I often prepared days before the interview by reading their web profile or LinkedIn page, scanning the organization they were part of, looking at papers they have written, and reviewing notes from previous informants who mentioned them. After this, I revised my semi-structured interview guide to tailor questions to their role and position. For example, in my interview with a New York coach who had previously worked with an organization in Philadelphia, I asked specifically about the differences between the two organizations in terms of using EWIs. If something had also been referenced in a different interview, I would ask for details with another informant to
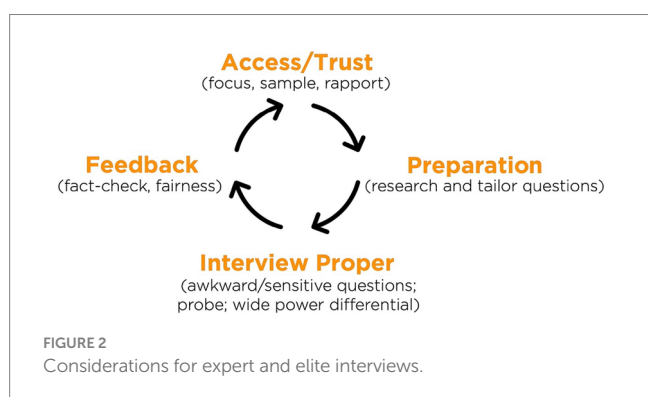
confirm or challenge the perception. For example, I asked multiple coaches in Chicago for their examples of how schools responded or resisted to EWIs, and I tried to document similarities and divergences in these accounts.

Moving to the *interview proper*, a third consideration is interviewing in the context of a wider power distance between the researcher and the informant. On one side, there may be awkward and sensitive questions that look at the educational practices and policies more critically. Discretion is necessary here since experts and elites may understandably feel defensive about criticism of their work and may already have a well-rehearsed rejoinder for these criticisms. During these cases, other researchers have asked their informants to document what criticisms they have heard—or actually have—of the program, or detail the challenges they faced (Berry, 2002; Selwyn, 2013). On the other side, significant power disparities may influence the informant to "control" the conversation and lead the interviewer to be unable to ask probing questions. In these cases, it is best for interviewers to have a ready set of back-up or closed-ended questions that may help shift gears to bring the conversation back on track (Harvey, 2011).

For my research, EWIs have been widely documented to contribute to positive changes in schools, which is why I asked researchers when they have EWIs *not* working as intended. Here, I transform what might have been an awkward question potentially critical of EWIs to a question of if and how this had happened. I also asked my informants to detail the challenges and criticisms they faced in initiating and implementing EWIs. In one interview, I felt the informant giving short and terse answers to open-ended questions. I unfortunately did not have the tools to handle this situation. Looking back, I should have prepared a set of short closed-ended questions (e.g., "On a scale of 1 to 10, how would you rate EWI adoption in your city?") to transition us to more structured questions before going back to open-ended questions.

After the interviews, researchers may consider sending back the research to informants for *feedback*, *fact-checking*, and *revision*. While traditional interviews have done this like Jack's (2016) study of an elite college where he presented to the community his research findings, for expert and elite interviews this process of feedback may be all the more important if people and organizations were identified. But such process of gaining feedback may also be precarious since this may prevent researchers from writing critical and honest commentaries on these individuals or may open researchers to censure from their informants. While these remain risks in obtaining feedback, I argue that this informant feedback process can lead to productive conversations and clarification—important in providing a fair assessment of educational programs, policies, and initiatives.

In my research, every draft I write has been sent to informants whose quotes appear, whether they were identified or anonymized. I would send PDFs of papers with their names and quotes highlighted so that they may review the accuracy of the paper. Often, informants say that I have captured the narrative quite well or that they wanted some words changed either because of errors in grammar or factual detail. However, there were two instances when the changes requested were more substantive. In these cases, I tried to converse with them to clarify how to make the research more accurately reflect what they have experienced. Of course, I performed due diligence by confirming these changes with other informants or other documentary evidence.

5 Caveats and novel possibilities

Researchers conducing expert and elite interviews must be sensitive to at least four caveats in terms of *conflicts*, *caricatures*, *confinement*, and *criticism*. Conflicting perspectives may arise from different individuals who have dissimilar accounts or interpretations of the same phenomenon (Natow, 2020). In this case, the researcher needs to assess and judge evidence, often triangulating EEIs with "document analysis…, non-elite interviews or surveys, [and] conducting observations" (Natow, 2020, p. 170). Moreover, experts and elites have often been caricatured in certain ways that often paint them as either visionary saviors or self-interested villains (Russakoff, 2015; Keane, 2022). On one extreme, this can lead to the confinement of one's research to documenting simply the successes of a policy, research, or organization. On the other extreme, this can lead to the unfair criticism of these experts and elites' educational efforts, which can be imperfect but is at times neither sinister nor self-serving. In both cases, researchers may attempt to temper these extremes by providing space for imperfect successes, nuanced criticisms, and pluralist voices that can be obtained from both EEIs and traditional school interviews (Fuller, 2022). Of course, some efforts are necessarily worth critiquing and some researchers have an explicitly critical stance (Verger and Curran, 2014). In these cases, the researcher can be discreet in conveying this as fairly as possible and weighing the consequences for the relationships with informants. The strategies discussed in the previous can help address some of these caveats, particularly as greater preparation, relationship-building, and feedback-giving can reduce problems between the researchers and the informants.

Researching about early warning systems, I was concerned less about whether the policy was *truly* effective and more about the process of spread and change. In this way, my research question itself was less overtly political or critical. Other ways I attempted to reduce caricatures of experts and elites include asking about the successes, challenges, turning points, and political/economic gains of different actors; confirming interview answers with documentary evidence like changes in graduation rates or ACT scores in the three cities; complementing interviews with 22 interviews of teachers and school staff who implemented EWIs on the ground; and letting various individuals of different political persuasions read drafts to guard against bias and hold me accountable to fair treatment of the different voices in my research.

Expert and elite interviews offer a number of novel possibilities for education research. First, these may be used in addition to traditional interviews in order to understand and triangulate whether the "ideal" situation translates to what happens on the ground, particularly as schools are characterized as being loosely or tightly coupled organizations (Meyer and Rowan, 1977; Hallett, 2010). Second, these interviews may inform quantitative results and trends from analyses of big data, particularly when experts are prospectively asked about their hypotheses for program effects and quantitative results confirm or challenge these expert opinion (Deshpande and Dizon-Ross, 2023). Third, EEIs may also form the basis for network data regarding the consequences of relationships among individuals or organizations (Daly and Finnigan, 2010), or the discourses shared among particular policy experts or elites (Reckhow et al., 2021). Finally, these interviews—whether as part of the research or to begin

research—may generate new questions, theories, and ideas that further our knowledge of the complex education system as a whole.

In sum, this article has outlined key aspects of interviewing education experts and elites, particularly the salient differences with traditional interviews with students and school staff; the practical strategies from preparing for EEIs, conducting them, and seeking feedback after; and the caveats and possibilities that can expand our understanding of education.

Data availability statement

The original contributions presented in the study are included in the article/supplementary material, further inquiries can be directed to the corresponding author.

Ethics statement

The study involving human participants was reviewed and approved by the Social and Behavioral Sciences Institutional Review Board of the University of Chicago. The participants provided their informed consent to participate in this study.

Author contributions

JET: Conceptualization, Visualization, Writing – original draft, Writing – review & editing.

Conflict of interest

The author declares that the research was conducted in the absence of any commercial or financial relationships that could be construed as a potential conflict of interest.

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