Interview Planning Checklist

This checklist will help you as you plan your one on one interview or focus group, from question development through data collection and analysis.

Keys to Success:
- Print this checklist and keep it handy throughout the process.
- The more prepared you are in getting ready for your interview, the more you can focus on the interview itself.

2-3 Weeks BEFORE your Interview
- Develop an interview protocol, including informed consent language
  - Consider your assessment questions/purpose as you develop your interview protocol
  - Link to sample informed consent document: 
- Edit and review instrument
- Secure interview location(s): consider noise level, privacy, accessibility, etc.
- Recruit participants and schedule interviews
- When possible, review questions with a person from a similar population of the group you’ll be interviewing to ensure the questions make sense

1 Week BEFORE your Interview
- Discuss facilitation and interview process and concerns with team members
- Coordinate/order food, drinks, snacks, if planning to provide
- Coordinate incentives and rewards for participants, if applicable
- Make copies of interview protocol
- Confirm access to audio or video recording equipment (as appropriate), reserve as needed

1 Day BEFORE your Interview
- Know the location of your interview (e.g. be able to find the building, room #)
- Confirm time, date, and location with your participant(s) (send reminder via e-mail or text)
- Rehearse protocol questions. Practice asking questions and probes in your own words. Make any notes to yourself that will help you facilitate (e.g. “I should be sure to ask about what services they access, if it doesn’t come up in the conversation naturally”)
- Check audio recording equipment: check functionality and battery level

DURING Your Interview
- Check supplies
  - Copies of the protocol
  - Notepad and pens for note taking
  - Audio recording equipment (if applicable)
- Introduce yourself
- Remind participant(s) of the purpose of the study and how their information will be used and protected
- Ask permission to record the session (if applicable)
- Turn on audio recording equipment after participants have granted permission
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**Immediately AFTER your interview**
- Thank you participant for coming
- For focus groups: remind participants about confidentiality- what happened here, stays here!
- Provide contact information. Invite participants to follow-up via e-mail if they didn’t get to say something, want to retract a comment, have further questions, etc.
- Upload audio files and delete from recording device to protect confidentiality

**1-3 Days AFTER your Interview**
- Create list of preliminary themes related to answering your research questions
- Write a research memo reflecting on your experience

**1-3 Weeks AFTER your Interview**
- Transcribe interviews/send out for transcription
- Data Analysis

**4-5 Weeks AFTER your Interview**
- Prepare data for distribution (paper, verbal, presentation)
- Findings shared with leadership or key stakeholders

*For more information, check out the following documents located at: www.sairo.ucla.edu/AssessmentSupport.html*

- Worksheet for Assessment Planning
- Writing Effective Qualitative Questions
- Tips for Assessing Workshops
- Links to Additional Resources