

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

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