Why use interviews?

An interview is a one-on-one conversation with someone who has knowledge and experience about the specific topic you are interested in. Because the people who provide the data have perspectives that are important or "key", interviews for data collection are often called "key informant" interviews.

Interviewing is useful when:

- The topic is sensitive or people are likely to be inhibited by speaking about the topic in front of others
- People have a limited reading ability
- Bringing a group of people together is difficult
- You need in-depth understanding about complex topics (e.g., community participation, empowerment, or cohesiveness)
- You have a lot of open-ended questions and want to be able to ask for clarification or probe for understanding

Planning and developing interviews

Did you decide when to collect interview data based on your evaluation plan?

The timing for your interviews depends on what you want to learn about. To answer some of your evaluation questions, you may only need to do interviews once. To answer other questions, it may be useful to do them before, during, and after the program.

The first step is to decide who to interview. It is generally useful to interview a wide range of people in an effort to capture various perspectives on the topic, but the number of interviews will depend on your specific needs and resources. Good key informants:

- Understand the situation or topic you want to learn more about and are comfortable talking about it with you.
- Represent various points of view. You will need to determine what different characteristics/demographics are important for your interviews (e.g., age, racial and ethnic backgrounds, life experiences, educational levels, religious affiliations, profession/role, etc.).

Interview tool overview

Planning

- Decide when
- Identify the sample
- Recruit participants
- Identify & train interviewers
- Develop interview protocol
- Pilot test
- Finalize Logistics

Collecting data

- Track & document data
- Key follow up steps

Before the program starts	During the program	After the program finishes
• Identify what program features are needed • Get baseline data for later comparison • Assess community needs	• Assess progress • Learn about what is working and not working to improve the program	• Assess if the program achieved the outcomes • Understand who the program worked for

There are a number of methods you can use to identify the group of people or sample that you will be interviewing. If there is a limited number of people that participate in your program, it may be possible to interview everyone. Other options include:

- Randomly drawing names from a hat
- Choosing systematically from a list (for example, inviting every 5th person on your list)
- Dividing the group into subgroups based on characteristics (e.g., gender, age, geography, participant, eligible but not participating) and randomly selecting representatives from each subgroup. This method is used when you want to compare data across different subgroups.
- Recruiting people who are easy to reach (convenience sample). For example, you could approach individuals who are shopping at a farmers' market. Although this method can make it easy to recruit, the ideas expressed may not be representative of the people you're trying to get opinions from.
- Snowball sampling. You might also use a method where you start inviting a core group of people and ask them for suggestions of other knowledgeable people to whom you might talk. If you are working with a hard-to-reach population or have only a limited list to start with, using this method can expand your sample relatively easily. But it also may be subject to the same biases as a convenience sample.

Did you figure out the logistics – the where, when and how?

Some of the additional practical aspects of interviewing include deciding about:

- **Setting.** Determine when and where to conduct the interviews. Select the best mode of communication for your interviews— in person or over the phone. The date, time and location (if in person) should be convenient for the key informant. Try to conduct interviews in a quiet, comfortable, neutral, and private if necessary, space.
- **Recording.** Consider recording the conversation, but get permission from the key informants in advance.

Did you recruit and schedule interviews?

Contact key informants to invite them to participate. It is common to use email for this initial contact, but be sure to consider the needs and resources of the group you'll be interviewing— in some cases a phone call invitation for an interview is ideal. The initial invitation should come from someone the key informants are familiar with, and the person doing the interview can follow up with the details.

The invitation should include the logistics (i.e., who will be conducting the interview, where it will occur, and how long it will take), the purpose of the interview, and how the information will be used. If you are hoping to conduct follow-up interview at a later date, be sure to mention this up front.

It is also important to describe the benefits of participating, including whether there will be a commitment to share back what you learn. Consider whether or not it is possible to provide incentives to your interview participants. Incentives can increase the likelihood that people will participate. Incentives could be a monetary thank you such as cash or gift cards. If incentives will be offered, that should be communicated in the invitation and followed up on at the end of the interview.

Did you develop your interview questions and put them in a protocol?

Interviews are typically structured to some extent, although they may also be done more informally. The interview protocol includes the questions and provides a general direction and sequence for the conversation, while still allowing for flexibility. Interview protocols are useful to ensure that key questions are addressed and to provide some consistency from one interview to the next and between interviewers.

Interviews have three parts: the opening, the interview and the wrap-up. The following table describes each of these parts and the elements that should be included in your interview protocol.

Opening	• Introductions • Remind the key informant how long the interview will take • Review the purpose of the interview, what you'll generally talk about, and how the information will be used • If recording, get permission to do so • Provide an opportunity for the key informant to ask any questions • Use an easy, warm-up question to build rapport and get the key informant talking

Interview	• Guide the key informant through the questions outlined in the interview guide
	• Use language that is respectful and relevant to the key informant
	• Create comfort by having open body language and actively listening to responses. If you are the phone, this may mean saying "yes" and "I see" after their responses to keep them talking.
	• Use probes to explore ideas in more depth and to get clarification. Good probes to use are:
	  ◦ *What other ideas do you have about…?*
	  ◦ *What other reasons did you have for…?*
	  ◦ *What do you mean by…?*
	  ◦ *Could you say more about…?*
	  ◦ *Could you give me an example of…?*

Wrap-up	• Be mindful of the allotted time; if more time is needed, check with the key informant about continuing for longer if needed • Ask about any outstanding comments or questions • Thank the key informant again and remind them how the information they provided will be used • If using an incentive, confirm how and when they will receive it • Ask if there is anyone else that they think you should talk to, if appropriate

Tips for developing interview guides:

- Create an outline of topics to cover.
- Check if interview questions already exist before writing new questions. Is there something at your organization that you can adapt or modify?
- Formulate questions that:
  - Engage the key informant in a discussion. This means using open ended questions—those that can't be answered with "yes" or "no." These questions lead to longer, more discussion oriented responses. If you use a "yes" or "no" question, be sure to follow it up by prompting the respondent to explain their answer.
  - Are easy to say—the interviewer should be able to say them naturally, without difficulty.
  - Are short, clear and easy to hear and understand.
  - Resonate with key informants in words they use in their local context—avoid using jargon, acronyms, and overly technical words, unless that is appropriate for the group.
  - Focus on one thing at a time. For example, do not ask, "How has the program changed the way you eat and exercise?" Instead, ask about eating habits and then ask about changes in physical activity.
- Develop follow up probes, on key topics as needed.
- Determine the logical order of questions. Your goal is to engage in an interview conversation that will flow naturally from one topic to the next. Typically, questions will start more general and then get more specific as the interview progresses. If you will be asking sensitive questions, it is often best to ask these later in the interview, after rapport has been established.
- Prepare opening and wrap-up remarks. These are really important for building rapport and leaving the interview on a positive note where next steps are clear.

Did you identify and train your interviewer(s)?

It is important to think about who is most appropriate to conduct the interviews so that you can get candid responses to your questions. When selecting interviewers, ensure that the interviewer is:

- Neutral. If the interview is not directly tied to your program or organization, you may be able to train program staff—for example, if you are conducting interviews with community leaders about community needs that your program could address.
- Familiar with the subject matter, but unbiased/non-judgmental so as to not influence or drive the respondents' comments—they must be able to listen without inserting their own reactions or opinions. The interview is seeking the opinion of the person being interviewed and not providing information to the person.
- Able to facilitate the conversation and get through the important questions during the requested amount of time.

The depth of the training will depend on the level of experience of the individual(s) involved. At a minimum, training should include:

- Build an understanding of the interview guide (i.e., the introduction, the questions being asked, what you need to learn, any follow-up that will be needed, and what will be done with the information) so that they can adequately conduct the interview similarly across multiple interviews, and answer any questions that respondents may have.
- Clarify expectations about how responses will be recorded and what will be done with those notes or transcripts.
- Reviewing how to engage in active listening and how to probe effectively.

When more than one interviewer is involved, training is key to ensure that they carry out interviews consistently. This often means conducting mock interviews (see below) or having two interviewer attend the first few interviews to ensure consistency. After the first few interviews, it is helpful to debrief to resolve any issues that have come up with either the protocol itself or how it is administered. This will also provide a natural check for your systems for recording and storing the interview information.

Did you pilot test your interview guide?

Before beginning interviews, you will want to pilot test the interview guide by doing mock interviews. You can do this with anyone who can keep the goals of your interview and the perspectives of your informant in mind at the same time. Mock interviews can give you a sense of how long the interview will take, if the flow is logical, and whether there are any questions that are unclear or that don't get you useful responses. This can also help your interviewer(s) to become more familiar with the interview guide.

After pilot testing, make adjustments to the interview guide as needed. Do not use the data you collected in the pilot testing for your evaluation unless the respondents are part of your sample and you have not significantly changed the instrument.

Collecting interview data

Did you pay attention to these key tips when conducting your interview?

The interviewer sets the tone of the interview, affecting whether the key informant feels comfortable voicing their opinions. During the interview, a good interviewer:

- Is not biased or judgmental. It is important to be neutral when hearing key informant's responses.
- Lets key informants know that "they're the experts," reinforcing that the purpose of the interview is to learn from them.
- Is comfortable with some silence. Some key informants may contribute more if they have time to consider the question before they speak.
- Uses probes—questions designed to stimulate ideas or encourage further sharing—to gather additional information
- Uses an appropriate pace to ensure that all of the important questions are asked.

Did you keep track and document your completed interviews?

You may do your interviews over the phone or in person, and you may have one or more interviewers or note takers present. Developing a consistent system will ensure you don't lose any information and are learning from each interview as you go.

- **Video/audio:** If video or audio recording is involved, you will need to get permission from participants beforehand. Be sure to test any equipment before the session begins and make sure there is no background noise so you will have a clear recording. If you don't have a note taker present, you will also need to plan for the recordings to be transcribed later.
- **Note taking:** If note taking is your method of choice, arrange for a skilled note taker to be present. Consider recording the conversation as a backup to the written notes and to retrieve verbatim responses as needed.

If you have multiple interviewers, ensure that they are documenting in the same way. Consider looking across the interviews after they have each done a few to ensure consistency.

To keep an eye on what you are learning as you go, set aside about 30 minutes after the interview to give yourself time to record your impressions and clean your notes while the information is still fresh in your mind. If there are multiple interviewers for one interview, debrief the interview together. Record impressions of the overall tone of the interview, as well as important attitudes, phrases and feelings conveyed. This is particularly important when conducting multiple interviews, as it often becomes difficult to distinguish between the different interviews later on.

Did you complete these follow up steps after your interview was complete?

- **Thank participants.** At a minimum, it is important to thank the people you interviewed for their participation and to inform them of any next steps. If other people helped to make the interview possible (e.g., provided space, helped contact potential participants, etc.), you may also want to thank them for their help.
- **Plan for data analysis.** To analyze the data you need to (1) organize the data that you recorded; (2) conduct the appropriate level of analysis; (3) interpret your findings (i.e., what do the data tell you?); and (4) identify limitations of your data collection efforts. For more information, see the tool Analyze and Interpret Evaluation Data.
- **Report back to participants and program planners.** When people participate in an evaluation effort, they often like to see the result. You should consider appropriate ways to report back to participants, and determine how the information will be used to help with decision making and program improvement. For details, see the tool How to Use and Share Results.

Sources:

- National Science Foundation: Overview of Qualitative Methods and Analytic Techniques https://www.nsf.gov/pubs/1997/nsf97153/chap_3.htm
- University of Wisconsin–Extension: Program Development and Evaluation http://fyi.uwex.edu/programdevelopment/
- W.K. Kellogg Foundation: Evaluation Handbook. https://www.wkkf.org/resource-directory/resource/2010/w-k-kellogg-foundation-evaluation-handbook
- University of Arizona, Norton School of Family and Consumer Sciences: The Use of Qualitative Interviews in Evaluation http://ag.arizona.edu/sfcs/cyfernet/cyfar/Intervu5.htm

For more information about planning and conducting interviews, please see the toolkit Resources page.

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