



### ***The Initial Liaison Interview***

**Purpose:** Gather data about sponsoring organization and project, and develop interviewing skills.

In order to formulate your proposal, you must collect rich information about the sponsoring organization, its understanding of the problem underlying the project, and its expectations for the conduct and outcomes of the project. You and your project sponsor are both very busy, so your team must develop a well-organized plan to elicit information from your sponsor efficiently. This handout and assignment are designed to provide you the necessary guidance to prepare, conduct and follow up on the initial liaison interview, and to provide a model for conducting other interviews during your project. Approvals required from faculty at key steps along this interview process are designed to assure you will be prepared to conduct interviews (formal or informal) on your own as part of the IQP, whether with sponsor personnel, other experts, members of the public, etc.

**The goal of the interview is to gather information from the sponsor**, not for you to present your ideas about the project – the time for this will come soon enough, when you are better prepared.

#### ***Principle Elements***

1. Read about interviewing
2. Conduct background research about sponsor and project
3. Prepare an interview plan
4. Conduct the interview
5. Write up an interview summary
6. Send thanks and copy of interview summary

#### ***Elements Described***

**1. Read about interviewing:** Read about “Key Informant Interviews” at the University of Illinois Extension, Program Planning and Assessment site: <http://ppa.aces.uiuc.edu/KeyInform.htm>. This short piece provides very good information needed to understand key issues pertaining to interviewing that you can use in your Interview Plan, and references you can use later if your work will involve much interviewing.

#### **2. Conduct Background Research**

Review all sources of material you have on your sponsor and the project (e.g., sponsor’s web site, previous IQPs, sources from preliminary conceptualization, etc.). You should know as much as you can about your sponsor and project *before* your interview.

#### **3. Prepare a semi-structured Interview Plan**

**Post the plan for faculty review** and approval **before** conducting the interview!

Based upon our class discussions, readings, and other sources of guidance, prepare a semi-structured interview plan. Your primary objective is to **gather information from your liaison** – you should express your ideas only as needed to elicit relevant information from them. A semi-structured plan allows you the opportunity to do this and the flexibility to follow threads of information that emerge as a result of your

interview. The interview should be comfortable and conversational. This is another reason to do a thorough job of background research, you'll be more comfortable because you'll be confident.

**Include in your interview plan ALL the following elements, in the form of well organized notes, rather than prose.**

- Methodological Note: explain briefly the kind of interview you will be conducting, its key features, and why this method is more appropriate for the liaison interview than other interview methods (reference ideas from <http://ppa.aces.uiuc.edu/KeyInform.htm>).
- Where, when, with whom, and how the interview will be conducted.
- Which team members will be responsible for various tasks: note-taking, introducing the team, writing the summary, reviewing the summary for factual and grammatical errors, etc.
- The information you seek to collect (question form often works well). **Be sure to probe for problems and causes underlying the project**, not "what do you want us to do?"
- As a team decide on an interview schedule, which is a general order of questions (i.e., write your questions down in "ideal" order, or organize them thematically with numbers beside indicating question order). Be flexible, though. If the interview flows into questions that are further down on your schedule, do not hesitate to jump around as necessary. It is also good to ask a couple of easy questions up front, just to put you and the respondent at ease.

#### **4. Conduct the Interview**

Be professional in your dress (if in person) and manner. Listen carefully. Ask appropriate follow-up questions. Stay on point. Be enthusiastic, but let people finish. End on a positive note.

At least two people should take notes, recording information either **chronologically** (i.e., as a running transcript following the order of the conversation) **or topically** (e.g., filling in questions in the interview plan as they are discussed). The lead questioner should keep track of which questions are getting answered and lead the session so that all key points are covered.

If your project liaison identifies other people to speak to, prepare and conduct further interviews ASAP. To prepare, simply modify your liaison interview plan as needed to fit the context of the new contact. Write up a summary of this interview, too.

#### **5. Interview Summary**

Immediately following the interview, 2 team members should write up a complete accounting of the interview. All major points should be summarized and **grouped topically**. If any questions remain about the information, note it, and have a team member contact the respondent to clarify his or her position. Once you agree on an "official" interview summary, post to MyWPI for review, and upon approval, send as an attachment to a well written follow-up thank you email (copy faculty on this email).

#### **6. Send thanks and copy**

Send a thank you note to interviewee with a copy of the interview summary that they can read, if they choose, for accuracy. Copy faculty on email.