

Worksheet: Planning Interviews with Beneficiaries

Steps	Things to Consider	Your Notes
<p>Decide who will collect data</p>	<p>Consider skills needed for data collection, e.g., ability to establish rapport with interviewee, good listener, objectivity.</p>	
<p>Decide where to collect data</p>	<p>Consider attending meetings that are already being held to discuss the subject.</p> <p>Hold a town hall meeting.</p> <p>Schedule individual interviews.</p>	
<p>Determine how you will select and recruit people for the listening sessions</p>	<p>Consider how to select people who represent differing views of the issue. Use:</p> <ul style="list-style-type: none"> ○ Existing lists ○ Intercept locations ○ Referrals from an organization or individuals ○ Open solicitation <p>Consider where they are most likely to be receptive to your invitation.</p> <p>Prepare a brief invitation explaining the importance of the problem and the value of their input. Let them know participation is limited to select people.</p>	
<p>Decide how to thank participants</p>	<p>Consider incentives or small tokens of gratitude:</p> <ul style="list-style-type: none"> ○ Gift cards ○ Gifts ○ Coupons ○ Chance to win a prize ○ Thank you cards 	

<p>Decide who will conduct the research</p>	<p>Consider listeners who:</p> <ul style="list-style-type: none"> ○ Understand the topic and what you need to learn ○ Listen exceptionally well ○ Can build rapport with the people they are listening to ○ Are experienced researchers 	
<p>Decide how many interviews to schedule</p>	<p>To begin, conduct 5 - 10 individual interviews within each major segment. After analyzing the results, complete additional interviews if more information is needed about a respective audience group.</p>	
<p>Decide who will create the interview guides</p>	<p>One or more people who have formal training in qualitative research methods should develop the interview questions. A sample set of questions is available to assist them in designing an interview guide that will generate insights needed to create the marketing plan in Step Six.</p>	

Sample Questions for Interviewing Beneficiaries

Purpose of Questions	Sample Questions	Your Questions
<p>How to Frame the Issue</p>	<ul style="list-style-type: none"> • When I say (X), what is the first thing that comes to mind? • What makes this issue important to tackle right now? • Who do you think has contributed to the problem? Who has made it worse? • Who is responsible for fixing it? • What should they do? • How does the media talk about the problem? What do they say about the people who are at fault? Who could fix it? Where else have you heard about the problem? • What do other people say about it? • What American values are stake? (Probe or listen for big ideas or values: like freedom, justice, community good, success, rights, responsibility, prevention, stewardship, family, etc.) • Probe or listen for metaphors. • What will happen if we don't fix the problem? • How will our lives be better if we do? 	

<p>How to design policy to maximize benefits for this audience group</p>	<ul style="list-style-type: none"> • After describing policy solution to the problem, ask: • What does it mean to you? <ul style="list-style-type: none"> ○ What do you like about the proposed policy? ○ What could make it work better for you? 	
<p>How to design policy to minimize costs for this audience group</p>	<ul style="list-style-type: none"> ○ What do you dislike about the proposed policy? ○ What could be changed to eliminate that problem? 	
<p>What partners to enlist to promote the policy</p>	<ul style="list-style-type: none"> • Who would you trust to give you information about this issue? • How best could they get this information to you? (What sources) 	
<p>How to promote the policy</p>	<ul style="list-style-type: none"> • What would make this issue important to tackle now? • Share specific ideas being considered, and then ask for their input and recommendations • What groups would be most likely to advocate for the issue? 	

Worksheet: Planning Interviews with Stakeholders

Steps	Things to Consider	Your Notes
<p>Determine how you will select and recruit stakeholders for the listening session</p>	<p>Consider how to select people from this group for listening sessions. Can you use:</p> <ul style="list-style-type: none"> • Existing lists? • Referrals from an organization? <p>Consider where they are most likely to be receptive to your invitation.</p> <p>Prepare a brief invitation explaining the importance of the problem and the value of their input.</p>	
<p>Decide what format to use for listening to them</p>	<p>Individual interviews are probably the easiest and most personal. However, you might consider telephone interviews. If you do a group interview, be sure to use an experienced focus group moderator or someone skilled in handling group dynamics.</p>	
<p>Decide where to hold the listening sessions</p>	<p>A person's office may be the most convenient, but give the interview subject an opportunity to select another convenient location or conduct a telephone interview.</p>	
<p>Decide how to thank participants</p>	<p>Thank you letters may be enough, but in some situations an incentive or small token of gratitude may be helpful to increase participation. If incentives are used they should be consistent for each individual within a respective audience group.</p>	
<p>Decide how many session to schedule</p>	<p>Start with 5 to 10 individual interviews and then decide how many more are needed.</p>	
<p>Decide who will create the interview guides</p>	<p>One or more people who have formal training in qualitative research methods should develop the interview questions. A sample set of questions is available to assist them in designing an interview guide that will generate insights needed to create the marketing plan in Step Six.</p>	

Sample Questions for Interviewing Stakeholders

Purpose of Questions	Sample Questions	Your Questions
How to Frame the Issue	<ul style="list-style-type: none"> • What have you heard about (X)? • What are your feelings about the issue? • Who do you think has contributed to the problem? Who has made it worse? • Who should be responsible for fixing it? • What should they do? • What do other people say about it? • What American values and freedoms are stake? (Probe or listen for big ideas or values: like freedom, justice, community good, success, rights, responsibility, prevention, stewardship, family, social justice, social support, social cohesion.) • Probe or listen for metaphors, e.g., 'searching for a cure', 'a battle against the problem' or 'for the solution'. • What will happen if the problem isn't fixed? • Who is at risk? 	
How to design policy to maximize benefits for this audience group	<ul style="list-style-type: none"> • After describing the policy solution, ask: • What does it mean to you? <ul style="list-style-type: none"> ○ What do you like about the proposed policy? ○ What could make it work better for you? 	

How to design policy to minimize costs for this audience group	<ul style="list-style-type: none">• What do you dislike about the proposed policy?• What could be changed to eliminate that problem?	
What partners to enlist	<ul style="list-style-type: none">• What would you be willing to do to support the policy?• How could you help us?• Who else could help us?• How could they help us?• What contacts do you have with these groups?	

Worksheet: Planning Interviews with Decision Makers

Steps	Things to Consider	Your Notes
<p>Determine how you will select and recruit policy makers to interview</p>	<p>Consider how to select policymakers for listening sessions. Can you use:</p> <ul style="list-style-type: none"> • Existing lists? • Referrals? <p>Consider where and when they are most likely to have the time and interest to say yes to your invitation.</p> <p>Consider their work with past and current initiatives.</p> <p>Prepare a brief, formal, personalized invitation that addresses the importance of the project to their constituents and emphasizes the value of their input. (See sample invitation in resource kit.)</p>	
<p>Decide the best format for listening to policy makers</p>	<p>Individual interviews are the most realistic option for getting input from policy makers/decision makers. However, important insights may be gained by attending legislative committee meetings or other relevant policy making sessions.</p>	
<p>Decide where to hold the interview</p>	<p>Policy makers are most likely to prefer meeting in their offices or prefer telephone interviews. They often want the interview guide ahead of time.</p>	
<p>Decide how to thank participants</p>	<p>Consider whether or not incentives are appropriate, especially if conducting short interviews with people in their offices. Many officials may not be permitted to accept gifts. Providing timely thank you letters is essential.</p>	

Select people to invite	Consider people who: <ul style="list-style-type: none"> • Represent the people affected by the policy • May have a personal interest • Have a similar interest • Are receptive to hearing what you have to say 	
Decide who will listen	Consider people who: <ul style="list-style-type: none"> • Listen exceptionally well • Are trusted or can establish rapport • Know what you need to learn 	
Decide how many sessions to schedule	Start with 3 to 5 policy makers. After you analyze the results, more interviews can be completed if additional information is needed.	
Decide who will create the interview guides	One or more people who have formal training in qualitative research methods should develop the interview questions. A sample set of questions is available to assist them in designing an interview guide that will generate insights needed to create the marketing plan in Step Six.	

Sample Questions for Listening to Decision Makers

Purpose of Questions	Sample Questions	Your Questions
How to Frame the Issue	<ul style="list-style-type: none"> • What have you heard about (X)? • What are your feelings about the issue? • Who do you think has contributed to the problem? Who has made it worse? • Who should be responsible for fixing it? • What should they do? • What do other people say about it? • What American values and freedoms are stake? (Probe or listen for big ideas or values: like freedom, justice, community good, success, rights, responsibility, prevention, stewardship, family, social justice, social support, social cohesion) • Probe or listen for metaphors. • What will happen if the problem isn't fixed? • Who is at risk? 	
How to design policy to maximize benefits for this audience group	<ul style="list-style-type: none"> • After describing policy solution, ask: • What does it mean to you? <ul style="list-style-type: none"> ○ What do you like about the proposed policy? ○ What could make it work better for you? 	
How to design policy to minimize costs for this audience group	<ul style="list-style-type: none"> • What do you dislike about the proposed policy? • What could be changed to eliminate that problem? 	
What partners to enlist	<ul style="list-style-type: none"> • What would you be willing to do to support the policy? • How could you help us? • Who else could help us? • How could they help us? • What contacts do you have with these groups? 	