

The Initial Liaison Interview

Purpose: Gather data about sponsoring organization and project, develop interviewing skills
Length: as needed

In order to formulate your proposal, you must collect detailed information about the sponsoring organization, its understanding of the project specifics, and its expectations for the project's outputs. 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.

Principle Elements

1. Conduct background research.
2. Prepare an interview plan.
3. Schedule and conduct the interview.
4. Write up an interview summary.
5. Send thank you note to interviewee and a copy of the interview summary to confirm accuracy.

Elements Described

If your liaison does not respond to you in 1 week, follow-up your email with a phone call. Be polite, reiterate the contents of your letter (in summarized form, don't read the letter) and explain that this interview is crucial to keeping your project on schedule. Schedule an interview while on the phone, if possible. When an interview time is set up, confirm the time with a follow-up email. Let me know if you have difficulty getting a response from your liaison.

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 project *before* your interview.



Prepare a semi-structured interview plan

Submit the plan to instructor for feedback 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 absolutely 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:

- Where, when, and with whom 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 specific kinds of information you will need to collect (question form often works well).
- 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.

Interview

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

If your project liaison identifies other people you need to speak to, prepare and conduct the interview ASAP. Preparation for this interview will take less time. Simply modify your general interview schedule to the context of the new contact. Write up a summary of this interview, too. But only flesh out those elements that add to initial liaison interview.

Interview Summary

Immediately following the interview at least 2 team members should write up a summary of the interview. All major points should be summarized. Summaries should be prepared **independently**, then compared and any discrepancies resolved. 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” version, you must verify it with the respondent. Prepare an email cover letter to include with the summary. The cover letter should include:

- reconfirmation of your interest in the project;
- a “thank you” for the interview;
- request to review the enclosed summary;
- ask them to clarify any misunderstandings when they speak with you next.



Possible Interview Topics

Here is a **partial** list of topics that in some way you will likely want to discuss. Carefully think about and discuss your questions as a team, and put your interview plan into your own words.

Respondent background

- Role in organization?
- How long in job?
- Other jobs within the organization?

Organization background:

- Mission?
- Methods?
- Funding?
- Resources?
- Organizational structure: chart?
- Key external interest groups?

Project goals and objectives

- What are the short term/long term goals of project for agency? For society?
- How else are you attacking this problem?

Specific outputs of the project

- What tangible outcomes of the project do you envision (reports? New networks? Recommendations? Etc.)

Methodological ideas

- How do you see us accomplishing the project?
- Etc.

Potential problems

- What problems do you envision that we should plan for?
- Are there any project “opponents”?

Who else in the organization should you talk to?

Most practical ways to communicate: phone, email, etc;

Indicate your general schedule, and schedule for interview follow-up.



Another approach and more ideas for the interview plan:

1. What is the project's mission?
2. What is the big societal issue behind the project?
3. How does the big issue manifest itself in the locale?
4. Who is affected and why?
5. What are the costs?
6. What are some of the relevant statistics that exemplify the impact of the issue globally and locally?
7. What can the sponsor do about it?
8. What has the sponsor done to date?
9. What has been the outcome?
10. What has not been done?
11. How could more progress be made?
12. How committed is the sponsor the lasting solution?
13. What has been the expense incurred to deal with the issue so far?
14. What does the future of this issue look like if nothing is done?