EDIT Workpackage 5 – Interview guidelines

Introduction

At the time of writing, seven sets of interviews have now been conducted, in London, Budapest and Copenhagen. This document serves as a strategy guide to arranging and conducting a successful set of interviews.

Interview guidelines

1) Preparation

Sound preparation is crucial to a successful set of interviews. When visiting institutes in other countries a return visit is likely not possible, so it is important to cover as much ground as possible in the time available.

a. *The venue*
The venue for the interviews should be somewhere comfortable with plenty of light, sufficient space to layout diagrams and a laptop if necessary. If the expert's workplace satisfies these requirements it is perfect, as this generally allows access to any associated material that the expert uses in his work, and examples of past projects.

b. *Duration of the interviews*
One of the ongoing targets of the modelling process is to reduce the time required from each taxonomist to a minimum. Many scientists have packed schedules and many demands on their time, and this must be managed. It is equally crucial, however, that sufficient time is made available to explore their work in full.

I now request two half-days with each taxonomist, of roughly 3 hours each. Although the interviewing process continues to be refined, I believe that this is close to the minimum time required. Covering the full range of a taxonomist's work simply takes time, and there is a limit to how much this process can be compressed. In addition, dividing the interview into two sessions is essential. Omissions of detail and areas for further questioning will often only be noticed when writing up work. The work also has to be reviewed and agreed upon. I now ensure in advance that volunteers are willing to commit to this minimum time in advance.

c. *Set goals before the interview*
Make sure that the interviewee understands the reason for the interviews. The broad goals of EDIT should be explained, and how this work fits in to the wider project. I set specific targets for the meetings, explaining exactly what I am trying to achieve and how the meeting will be structured to accomplish this. Sending examples of work produced from previous interviews can be very helpful in this.

I also ensure I contact the taxonomist by phone rather than email alone. Establishing a good working relationship beforehand is important; especially in an interview involving detailed questions about the minutiae of the scientist's working habits.

d. *Research the field of study*
Research into the taxonomist's field of study provides crucial background understanding necessary to an in-depth interview. All branches of science

contain unique concepts and terminology, and research will provide a familiarity with the fundamentals beforehand. In the absence of this it is unlikely that the interviewer will be able to make the most of the time available.

e. *Preparation for the interviewee*
Both parties should undertake preparation for the interviews. The interviewee should be advised and encouraged to think about their work in the context of the interview beforehand, making notes as appropriate. Sending examples of past work will provide a focus on practical examples. Be aware however, that this preparation cannot be guaranteed, so be prepared to start from scratch on the day.

f. *Ensure you have all necessary materials*
Along with the obvious items to record information, I ensure that I have to hand a range of examples of past work, including the models and their associated documents. Template models can be very useful for quickly sketching out ideas. As printers are not always available it is a useful precaution to have print outs of these models. A memory stick is very handy for collecting copies of electronic files. Think ahead.

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2) The interview

These points are concerned with providing a structure to the interview that allows the best use of the limited time available. Though the interviews are informal, it is important to provide a framework in which to organize the discussion. This will help prevent drifting off topic, and also provides a rough guide as to progress.

a. *Provide an introduction and context*
Despite preparation, interviewees may not fully understand the goals of the interviewing process. I briefly describe EDIT, how my work fits in, and what I hope to achieve over the interview.

b. *Adopt an Iterative approach*
First start with the broad picture; establish the main stages of the work process. Once this broad view is established go back through the model and focus drawing out the individual steps of these broad activities. With each iteration, focus in greater detail on the individual actions until all relevant information has been drawn out. Regularly reviewing progress is a key element of the interview. Aim for 3-4 iterations of the process, with the final run through serving as a review, serving to confirm what you have discovered.

c. *Questioning techniques*
The nature of questioning will change as the interview progresses. During the early stages, questions should be as open as possible. The intention is to allow the interviewee space to speak freely about their work, with guidance from the interviewer to stay on topic. Don't try to force the information into a framework too early. Interventions should be more like prompts.

Once enough information has been gathered to establish the broad stages, sketch out a rough model to provide clarity. Now loop back through the process, describing each stage in more detail. Questions should now become more focussed. As the iterative approach continues and more details are sought, questions can become more specific now that the purpose is to elicit specific facts.

The goal is to gather sufficient information both to identify the exact boundaries between individual steps, and to describe each process in full.

David Taylor, December 2006

Key questions:
- How did you know to start the process?
- How did you know when it was finished?
- Who is involved and what do they do?
- How long does it take?
- What resources are required for the process?
- What is produced as a result of the process?

d. *Checking understanding*
It is important that the interviewer checks their own understanding throughout the interviews, taking care not to move on without fully exploring the meaning behind each process. This is a particular pitfall in the latter stages of an interview when both parties can become overloaded with information. Guard against assumptions. Do not let any jargon pass by without being sure you understand what is meant. If necessary, note down questions for the review at a later point.

e. *Structure note-taking*
A variety of approaches can be used to record information as the interview progresses. For the early stages I tend to use hand-written notes, taking care to categorise each section clearly. Even when writing up immediately afterwards, notes can become unclear if jotted down without structure. If any time passes between the interview and write-up, information noted down in isolation can become meaningless.

Once the model begins to develop, sketch it out on a large piece of paper and add annotations to this. This helps to clarify process flow. For later interviews, I would hope to have a print out of the emerging model, which can again be annotated as required. I encourage the interviewee to add to or adjust the model themselves; this can be extremely helpful as it forces them to think directly about what they want to express, and also removes the possibility of my forcing ideas upon them.

3) Follow-up work

a. *Write-up the interview as soon as possible*
Recent memory will provide information that even the most detailed note taking will miss. Write up notes as soon as possible, preferably the same day. Notes will make much more sense when the experience is fresh in memory, omissions will be easier to spot, and relevant questions will be more likely to occur.

b. *Prepare and send follow-up questions*
Prepare a list of questions and areas for further discussion as you write-up, and address these points either in subsequent interviews or by email afterwards. Again, these should be sent as soon as possible afterwards.

For the future I will be looking into audio recording of interviews, especially for the upcoming structured group discussions where note-taking will be impractical.

David Taylor, December 2006