



Evaluation Methods: Telephone Interviews **7F**

social research **Update**

Telephone methods for social surveys
Roger Thomas and Susan Purdon (1994) Update 8 University
of Surrey at <http://sru.soc.surrey.ac.uk/SRU8.html>
accessed June 2008

Practical advice for undertaking telephone interviews

The following resource provides the essentials for conducting a good telephone interview. It provides a simple guide for beginners, equipping them with all the tools needed before and after conducting a telephone interview.

Preparation

It is important that individuals taking part in telephone interviews are selected carefully, briefed before the telephone interview using in writing with an explanation that includes the:

- Purpose of the interview
- Date and time of the interview
- Anticipated length of time the interview might take
- Details about confidentiality and anonymity that you can refer to later

It is possible that this initial negotiation and process of gaining access to the interviewee will be supported by a 'gatekeeper' (someone who acts as a link to participants, e.g. a teacher providing links to parents, or other colleagues) or another member of your team.

Introduction

Before beginning the interview, you should check with the interviewee if he/she is available to talk, or if the time is not convenient to re-arrange a more appropriate time to conduct the interview at the interviewee's convenience. You should then commence the interview by introducing or reintroducing yourself, the organisation/institute that you are working for, and the purpose of the interview. For example:

'Thank you for agreeing to talk to me. To remind you, I'm (insert your name here) and I work for the (who you work for), based at (which department/organisation/institution). We are undertaking an evaluation on behalf of (the name/institute that the research is being done on behalf of) looking at the work of the (summarise in one line what your research aims to find), so hopefully you have time to answer a few questions. (Possible extra information)

It is useful to clarify and confirm their contact details at the start of the interview, this is perhaps more important than in a face to face interview due to the fact they may need to finish the interview quickly. Ensuring you have full contact details means you can return to them at a later date.

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Ethical considerations

Reassure the interviewee that their confidentiality and anonymity will be respected see section 6 and Information Sheet **6E** for further information about confidentiality and anonymity.

All information you give will be confidential to the (xxx) research team, and your anonymity will be ensured, and you will not be identified in the report or our discussions with the working group chair.

You will need to think about how you will record or capture the comments made during the telephone interview. One approach is to record the conversation using a recording / transcribing device one we have used which includes a hands free microphone with built in transcribing system e.g. SANYO TRC-6300 Microcassette Dictating/ Transcribing System. If you use a recording device always check at the end that it has recorded.

Whatever approach you use you need to explain this to the interviewee before the start of the interview. For example:

With your permission, I'd like to record our conversation. This will help me to concentrate on what you are saying and save me trying to write everything down, following the interview I will make some notes from the tape.

If using a recording system the following functions are useful.

1. Remote control handheld microphone with speaker
2. 3 digit LED tape counter /
3. Cue tone index search function
4. Quick erase function
5. Adjustable playback speed control for transcribing

You might also think about the size, number and storage of tape cassettes. Once details have been obtained you may choose to reuse the tape. (see **section 7** for data collection and **section 8** for data analysis, both of which refer to issues of data storage).

Finishing the interview

After you have gone through the questions it is important to invite the interviewee to offer any other comments or to ask any final questions. If you are not sure of the answers to any questions they ask offer to find out and return their call.

After all the questions have been completed remind them of anything either of you have agreed to exchange following the interview, for example, interviewees may mention documents or resources they think you will find interesting, remind them at the end of the interview and confirm your contact details.

If you have offered or agreed to give the interviewee a copy of the transcript or notes from the interview make sure you state when you expect to send them this information. If there is a change to this arrangement then let them know why there is a delay and when you anticipate sending them the material.

Finally, thank them and follow up the interview with a letter or email thanking them for their help and reminding them of your contact details.

Based on ideas collated by Deena Jayousi

July 2008 version 1