writing for green

Discovery Interview Framework

Discovery interviews are often a key part of the grant writing process. If you are writing on behalf of an organization (e.g., as a paid grant writer or consultant), then you will need to elicit from the organization's leaders all the information that you will need in order to write a solid proposal.

If you are writing on behalf of your own organization, you may need to conduct interviews with various members of your organization's team or with subject matter experts (e.g., a representative of a company that sells air quality monitors, for a proposal that involves air quality monitoring).

Knowing how to ask questions—and how to listen well—is key to getting the info you need for your proposal.

Key principles/ objectives of the discovery interview

- If this is your first substantive conversion with the interviewee, establish a rapport
- Establish the purpose of the interview - to collect information to write a compelling story, leading to a result which they (ostensibly) want - such as money, or a record of their work, etc.
- Set expectations, for example that you:
    - Will be asking a lot of questions to gain a deeper understanding of the subject matter
    - Some of the things you ask about will be obvious to them, but new to you
    - Need them to be somewhat patient because you will be asking many questions about a topic they are already very familiar with
    - To start, it is most important that you gain a more comprehensive understanding of the topic, only after that point will you be ready to discuss higher-level strategies, etc.

Suggested strategies/ best practices to employ for an effective interview

- Your first interview should be with the individual who is most familiar with the subject matter.
- Establish a rapport with the interviewee, so they feel comfortable with you, and your questioning to come
- Use paraphrasing as a tool to: a) ensure you are comprehending/ absorbing the information being shared with you; b) slow down the conversation (i.e., if interviewee talks for extended periods of time)
- Follow your questions with other questions to develop a more solid understanding of topic
- Take good notes and/ or record conversation for future reference
- For the first interview, invite only one person. Having multiple people on the first call/ video conference will often shift the priority from *your comprehension/ education* to higher-level strategy, planning. Save those types of conversations for later - after you are 'up to speed.'
- Use both open-ended and more direct questions, depending on the information you are working to obtain, the context, and personality of your interviewee
- Start and end on-time
- Formulate a list of key questions to ask prior to the interview; don't feel obligated to ask every question, rather use this list as a guide to be sure you don't miss anything important

- Do some “homework” prior to the first interview - this will help you establish credibility and allow you to start exploring the real issues, more quickly. This homework could include reviewing the organization website, program materials, reports, the RFA, the funder’s website, etc.
- If the interview helped you identify information that you still need but your interviewee didn’t have, ask that person if they know to whom you should speak to get the answer.

Suggested process for an effective discovery interview

1. Tell the interviewee what you hope to get out of the conversation, and expected time period (45-60 min)
2. Ask a personal, open-ended question, such as: *How did you get involved in this work?*
3. Ask about the organization’s genesis and history - this is important context for whatever story you tell
4. Ask key questions about major elements you need for your story (such as: problem, solution, who will be helped, how the work will get done, etc.)
5. Follow your questions with more questions, to deepen your understanding, challenge interviewee
6. Request materials you will need
7. Review Task List
8. Set conditions for future contact (you will continue to reach-out with more questions) and next steps