Chapter 2

Selecting the Study Team

The successful staff-led feasibility study involves several staff members playing complementary roles. Key roles are outlined below:

- *Team leader:* This is the person who designs and manages the entire feasibility study process. See the role description on page 8.
- *Interviewers:* Organizational staff members who personally conduct one or more feasibility interviews.
- *Logistics support/coordinator:* Usually a support staff person assigned to update tracking information, records, and schedules, and produce study participant confirmation letters, e-mail messages, etc.
- *Statistical analyst:* A detail-oriented staff member with a keen eye for quantifiable information (numbers). This person will go through all interview notes to harvest statistical data.
- *Content analyst and report writer:* Someone who reads and interprets all completed interviews with an eye toward discerning emerging patterns of responses that can shape campaign communication and implementation strategy. Typically, this person is also responsible for drafting the narrative report of the findings and interpreting the statistics.

- *Report interpreter/presenter:* The person who reviews and interprets the summary findings and presents conclusions to stakeholder and decision-making groups.

While the team responsibilities are shown as separate duties, it is more common for some people to play multiple roles when competencies exist. For instance, the team leader may serve as an interviewer and be responsible for report presentation and interpretation. Similarly, someone providing logistical support may harvest and compile statistics. We will look at this option again when considering data analysis tools in Chapter 9.

Caution

Avoid the temptation to ask support staff to arrange interviews. While there are numerous logistical considerations that can be time-intensive, remember that every contact affords relationship-building opportunities and, therefore, should not be delegated to staff who lack a relationship with the intended interviewee.

Now you need to determine who you will put in the field to conduct the interviews. There are a few key criteria for selecting this team. Those best suited to conduct these interviews often share the following characteristics:

- *Professional development experience:* Major gifts staff and development officers are most experienced in establishing and nurturing relationships with prospective donors.
- *Highly relational, people-focused:* Regardless of the level of development experience, those who meet people easily and who have good socializing skills usually do well as interviewers.
- *Good self-regulators:* Ideal interviewers often have personality types that allow them to easily balance details with big-picture ideas, modulate their own style and behavior to adapt to that of others, and maintain the discipline to complete the interview notes before moving on to new interviews or other work.

Must all interviewers be people with fundraising experience? Not necessarily. While it certainly helps to have lived experience in the role of a gift solicitor, it is not essential that interviewers have fundraising as their primary role. There may be others who fit the general characteristics listed previously, but who fall into allied categories to development staff. Some of these alternatives include the following:

- Marketing/communication staff
- Deans, directors, or other program leaders
- Highly committed and engaged board members with related experience

Caution

While these other categories open the interviewer ranks to other professionals, be highly selective about their use. Some aspects of the study questions can be more explicitly compromised by using individuals from these last three categories. People in these positions are trained to promote the institution, thereby making it difficult sometimes for them to shift to more of a listening role. Marketing/communication staff can take quite personally observations about organizational low visibility or unflattering market position. Deans, directors, and program leaders can feel such a strong sense of ownership about potential projects for funding that they fail to listen with objectivity. Board members may not be able to elicit true feelings about board leadership and effectiveness. Every study has its trade-offs and who you choose to field as interviewers significantly shapes what you can learn.

How Many Interviewers Are Needed?

The number of interviewers required will depend on the number of interviews sought, the duration of the study period, and the geographic distribution of study participants. Additionally, the study must have some continuity for subsequent purposes of content analysis. That means limiting the number of interviewers. It is suggested that the maximum number of interviewers be five. In many cases, there will be no more than two or three interviewers.

Feasibility studies that draw participants from a single community are often the easiest to conduct, and they bring efficiencies to the process. Generally, interviews can be completed in 60–75 minutes. As a last resort, you may have to conduct some interviews over a meal. Avoid it when possible. In those cases when other settings are not possible, you will likely require 90 minutes, due to the distractions and practical necessities of dealing with the food.

Tip:

Be focused. Do not try to mix other business into the interview visit. Conduct the interview and defer the rest of your business until the interview is complete or to a future conversation. Why? The more you talk, the greater the chance of influencing or biasing your interviewee. In this role, you are there to harvest opinions, not to give one.

Devoting an entire day to these interviews might allow for four to five interviews a day for each interviewer. Obviously, geographic proximity of participants makes a big difference in how many interviews can be completed in a single day. Of course, you may have top prospects widely dispersed, which makes specific visits to each (or using the telephone) the only option. For purposes of this manual, it will be assumed that the majority of your targeted participants are reachable by car.

Because you will probably be driving from one location to another, you have to allow the necessary time for navigation and parking. Also, you should factor in a bit of time following each interview to capture your thoughts about what you have heard (more on interviewing and follow-up later).

A "typical" full day of interviews might look like this:

7:30–8:45 a.m.	Interview #1 (prospect's office)
8:45–9:30 a.m.	Note transfer, travel time, parking
9:30–10:30 a.m.	Interview #2 (prospect's home)
10:30–11:15 a.m.	Note transfer, travel time, parking
11:15 a.m.–12:15 p.m.	Interview #3 (prospect's club)
12:15–1:30 p.m.	Lunch, note transfer, travel time, parking
1:30–2:45 p.m.	Interview #4 (your conference room)
2:45–3:15 p.m.	Note transfer, travel time, parking
3:15–4:15 p.m.	Interview #5 (prospect's office)
4:15–4:45 p.m.	Note transfer, conclude the day

Given these assumptions, plan to ask each interviewer to devote an average of three days to perform interviews. Assuming an estimated average of four completed interviews in a day, an interview team of five individuals could complete sixty interviews, as shown below.

# Interviewers	# Days Devoted by Each	Average # Interviews Per Day	Total Team Interview Capacity
2	3	4	24
3	3	4	36
4	3	4	48
5	3	4	60

When there is great homogeneity of the targeted interview pool, it takes only about two dozen interviews to begin to identify recurring themes and emerging conclusions. As will be discussed later, it is desirable to interview more than that, which warrants a larger interview team, a higher number of completed interviews per day, or more interview days devoted by each interviewer (or a combination of all three).

Interviewing Alone or in Tandem?

Most interviews should be conducted by a solo interviewer rather than a pair. When development staff (and not outside consultants) are conducting feasibility interviews, there is sometimes a desire to bring along an organizational leader (e.g., CEO, executive director, marketing director, program leader, or board member) for the purposes of cultivation. There are times when this may be appropriate, but this should be done sparingly. From experience, it is known that when institutional representatives team up in interviews, three undesirable tendencies occur. First, interviewees tend to feel reluctant to fully speak their minds to the "assembled strength" of the team in front of them. Second, in all but the most effective interview teams, each representative tends to want to follow his or her own interviewing thread, thereby creating a choppy, discontinuous interview that does not address the intended focus. Third, the more people who are involved, the more each feels compelled to talk, thereby limiting the listening and learning that should be the primary focus of the institutional representatives in attendance.

Due to the strength of existing relationships, there may be times when it is appropriate to have a second person present during the interview. For example, a development staff member may serve as the primary interviewer, and one of the other leaders named previously may serve as a secondary interviewer—essentially, a second set of eyes and ears. In these instances, be sure to identify in advance which person is the lead interviewer and which is the secondary observer. Also, determine those areas of discussion that may be more appropriate for the secondary observer to initiate. As you weigh the potential benefits of these secondary interviewers, be sure to consider the earlier caution about the likely trade-offs.

Finally, once determining the preferred interview team, be sure that each member goes through a training session where interviewing techniques can be reviewed, questions addressed, and the interview guide examined. This is best done as a group exercise for the entire team. Team training should be conducted by a current or former experienced resource development consultant who has conducted numerous feasibility interviews and is willing to embrace the idea of staff members conducting their own interviews (as not every consultant embraces this concept). There are many fundraising consulting firms who can provide this service. It is best to select a firm with a deep research background, significant campaign feasibility experience, and a philosophy of wanting to impart to professional staff the tools to help them succeed.