**Recruiting Guidelines**

* Recruit 5 people from the target population—people respond to a request for help improving care for people with ongoing health conditions. Consider interviewing a few caregivers for additional perspective.
* Allow time for 1-2 hour interview
* Offer a reward (e.g. $50 gift certificate at Safeway). Reimbursement is key to getting their attention, making sure they show up or are at home at the appointed time.
* Get consent to take notes and share their story with others without identifying the source.

**Interview Guidelines**

* Interview in pairs: one person talks, the other takes notes and records the session.
* Start the interview getting to know the person. Take your time. Ask about their life history, job experience, and hobbies. Consider making a map with them of their significant relationships.
* Once you have established rapport and shown you can listen, you can ask about their health issues and experience with health care:
	+ What do you struggle with the most?
	+ What is the worst thing that happened to you in health care?
	+ What has helped you do better with your health?
	+ What did health care providers do that might have helped you?
	+ What did health care providers do that was not helpful?
	+ Tell me about any times you went to the emergency department or were admitted to the hospital.
* At the end of the interview, thank the person, review how what they shared will be used to improve care, and have them sign a receipt.

**Reviewing Stories**

* After all the interviews are done, the interviewers review the notes.
* Make sticky notes of the key points and group the sticky notes together by themes.
* Write up the themes, including quotes from people when relevant.
* Present to the broader team of evaluators to fine tune the message.
* A nice touch is to go back to the people who were interviewed to get their reactions on the product you designed or document you produced.
* Consider recruiting interviewees as patient advisors to your program.

Source: Ann Lindsay MD (adlindsa@stanford.edu)