



## GuideStar In-depth Interviews

### Interview Outline

Interviewer: Margaret Roller

#### **Introduction**

The interviewer introduces herself and explains that the general purpose of the interview is to discuss the needs and considerations among users of information pertaining to nonprofits and, specifically, how their needs are currently being met or could be better met in the future. The interviewer acknowledges that GuideStar is the sponsor of the research but encourages the participant to speak candidly about the issues, emphasizing that there are no “right” or “correct” answers to her questions and that all comments remain anonymous. The interviewer states that she would like to take notes during the discussion to assist her in report writing and asks the participant’s permission to do so. The interviewee is given the opportunity to ask the interviewer for further clarifications as to purpose, etc.

#### **I. Warm-up/Background Information**

- A. Let’s begin with a brief background of your organization and your role here.
- Talk to me about the overall focus of your organization and how the utilization of information/data pertaining to nonprofits fits in with this focus.
    - **Interviewer probes for specifics re: company’s business.**
    - What are some of your key objectives as it relates to the utilization of nonprofit data? **Interviewer probes for specific solutions to business problems.**
  - I see that you are the [**Interviewer inserts job title**]. What, exactly, is your role in the organization as it relates to the utilization of nonprofit data, e.g., are you the person who decides where/how to obtain the data, who supervises the users of the data, uses the data, or a combination of all these things? **Interviewer probes to identify the decision maker, person who acquires the data, internally who maintains the data, etc., i.e., the organization of responsibilities.**
  - What are your organization’s primary sources of information pertaining to nonprofits? **Interviewer probes for all online & off-line sources.**
    - What trade magazines or journals do you subscribe to?
    - Do you attend industry conferences or shows? What are they? How often do you attend?
    - Are there people who you consider to be leaders in your industry? Who are they? What impresses you most about these leaders?

## II. Current Processes & Utilization of Data

- A. Before we talk more about your key sources of nonprofit data, I am interested in understanding the processes your organization currently goes through to reach the objectives you mentioned earlier. Walk me through the steps of this process.

### **Interviewer probes for clarification of each step.**

- What are your resources for this step of the process?
- How does this step of the process integrate with the other steps?
- How many people are [who is] involved with this step?
- What is your greatest challenge in accomplishing this step?
- To what degree does time savings or efficiency play a role in the process?
- To what degree do you rely on documentation/substantiation?

- B. Now, let's talk more about the specific needs or uses you have for nonprofit data. Thinking about your objectives as well as the processes you just outlined, help me understand your specific information needs. **Interviewer probes for specific examples.**

- What are the top five or six most useful data points to your organization?  
Why is that?
  - Give me an example of how you use specific data points/pieces of information.
  - How does it fit with some other aspect of the process?
  - Are there types of information you currently get from an off-line source that you would prefer to get online? What is that?
- How do different situations/organizational functions result in different needs from the data?

## III. Current vs. Past & Future Processes/Data Utilization

- A. Thinking back on your organization's goals and processes, how, if at all, have these processes changed in the past five years?

- How have your objectives changed?
  - What led to these changes?
- What is the same or different regarding the process you follow?
  - How, specifically, did you adjust your processes based on different goals?
  - How has your job changed?
- What is the same or different in terms of your information needs?

- B. Now, what about the future? Thinking about where your organization has been and where it is today, how do you think your objectives and processes will be the same or different five years from now? If you and I were having this conversation five years from now, what would you be telling me about your goals, processes, and information needs?

- How will your objectives have changed?
  - What has led to these changes?
- What will be the same or different regarding the process you follow?
  - How, specifically, will you adjust your processes based on different goals?
  - How has your job changed?
- How have your information needs changed? What data points are in more or less demand compared to today? Explain. **Interviewer probes for specifics.**
- What are the regulations or trends or specific issues that will impact this future?

### III. Current vs. Past & Future Processes/Data Utilization (cont.)

- C. **[As appropriate]** What about specific challenges you face? How would you compare the challenges you face today with those you faced five years ago and those you expect to face five years in the future? Discuss.
- What are the regulations or trends or issues that will create the greatest challenge in the future?
    - Are these federal, state, or local government regulations? How so?
    - Are these regulations imposed by the industry or accrediting agencies? Explain.
  - What about internal pressures or corporate goals you face, e.g., specific to improving efficiency, reducing costs, managing risk, and documentation?

### IV. Information Providers

- A. Okay, let's talk now about your resources for nonprofit information. You stated earlier that you receive most of this information from **[Interviewer inserts sources mentioned in I.A.]**. Tell me how you first became aware of these providers and how you are using each in terms of:
- Frequency of access
  - Type of information
- B. How would you prioritize the important factors in selecting an information/data provider? What is most important to you and your organization? Why is that?
- C. How would you compare the providers you are currently using? **Interviewer probes for specifics.**
- Is one better than another in terms of the type or quality of the information?
  - How would you describe your experience accessing data from these providers?
    - Which is the easiest or most efficient to use?
    - Which is the most difficult?
    - Which is the most complete?
  - **[As appropriate]** How would you rate each on: **Interviewer probes for specifics.**
    - Breadth of data
    - Depth of data
    - Usefulness/allows you to make clear decisions
    - Ability to create custom solutions
    - Price
    - Providing information beyond data, i.e., other organization-related information
    - Accuracy of the data/information
    - Self-reported vs. government-reported vs. other source documents/information
  - To what degree do these providers also provide consultative services? Who does this and what are the services they provide?
    - Why are these consultative services important to your organization? How do they benefit your organization? **Interviewer probes for specific examples.**
- D. Which, if any, of these data providers have you recommended to your colleagues?
- Is there any reason why you would or would not recommend these resources?

#### IV. Information Providers (cont.)

- E. A few minutes ago, I asked you about how your goals or information needs may change in the next five years. How well do you think your current data providers will meet your future needs? Which are better suited to meet these future needs than others? What makes you say that?
- What do you perceive to be the biggest gap between your organization's information needs and what is currently available? In terms of: **Probe for specifics.**
    - Type/usefulness of information
    - Breadth of information
    - Depth of information
    - Accuracy of information
    - Speed of information
    - Reliability of self-reported information

#### V. GuideStar

- A. **[As appropriate]** Let's focus our attention now on GuideStar. I would like to begin by understanding your overall image or perception of GuideStar. What comes to mind when you think of GuideStar? When you think of GuideStar you think of...what? **Interviewer probes for clarification.**
- How did you first become aware of GuideStar?
- B. **[As appropriate]** You mentioned earlier that you utilize GuideStar for **[Interviewer inserts earlier mentions of GuideStar use]**. What (other) services or types of information does GuideStar provide? What is available from GuideStar?
- C. What, if anything, would you say is GuideStar's greatest strength or the area where they excel compared to other providers? Why do you say that?
- Have you recommended GuideStar to anyone either inside or outside your organization? If so, who and for what service or on what basis? If not, why not?
- D. And what is an area of weakness or an area where GuideStar could better meet your needs?
- E. **[As appropriate]** What other information providers are, in your opinion, comparable to GuideStar?
- On what basis do you base this comparison? What are the main attributes that make these providers comparable?
  - What about Websites specifically? What comparisons can you make between GuideStar and other sites?

## V. GuideStar (cont.)

F. **[As appropriate]** How would you compare GuideStar to other sites providing information on non-profit or for-profit organizations that you may or may not use in terms of: **This is not aided, sites might include Foundation Center, Hoovers, etc. Probe for specifics, e.g., specific e-docs.**

- Overall usefulness
- Type of information
- Breadth of information
- Depth of information
- Type of consultative services
- Ease of use
- Accuracy
- Reliability
- Transparency/rating systems
  - How useful/believable are these ‘certifications’?
  - What is the ultimate transparency? What would make you feel that you were getting a full, accurate picture of an organization?
- Price
- Delivery, e.g., the delivery of data sets, format/usability of reports
- Availability of other organization-related information
- Custom solutions, e.g., custom data sets, custom reporting

G. I am going to mention several services from GuideStar and would like you to tell me the importance of each to your organization, the aspects you find most/least useful, how accurate you think the data is, as well as how the service might be changed/improved to better meet your needs. **Interviewer probes for clarification of each [as appropriate] in terms of:**

- **Importance**
- **Most/least useful aspects**
- **Accuracy of the information**
- **Opportunities/improvements**

**Searches:** Select, Premium, Enterprise License

**Research Tools:** Analyst Reports, Charity Check, Grant Explorer, Data Services

**Compensation Research:** Compensation Report, Comparables Assessor, Salary Search

**Outreach:** State/MSA/county data (need Congressional districts, zip+4?), newsletter, contact email addresses

**Custom Solutions:** data sets, G4G, GS Pro, Data Integration, Private Label, eDocs

**Partner Products:** Publications

H. **[As appropriate]** We talked earlier about challenges and how your job or needs may be different five years from now. How could GuideStar better help you meet these challenges or make your job easier in the years to come?

- Above and beyond what you have already mentioned, where does GuideStar need to focus its attention as it relates to:
  - Existing products/services
  - New/untapped products/services

## **VI. The “Ideal” Data/Information Provider**

- A. Finally, we have talked about a lot of issues today and I would like you to summarize your thoughts by describing the attributes of an “ideal” provider of nonprofit data or information, esp., a provider to best meet your future needs. How would you capsule your thoughts in terms of the “ideal”?
- B. And, where would you place GuideStar in relationship to this “ideal”? How close does GuideStar come to the “ideal”?
- On a spectrum from 1-4, with ‘4’ being the “ideal”, where is GuideStar?
  - What does GuideStar need to do to move closer to the “ideal”?
  - **[As appropriate]** What advice would you give GuideStar to become your data/information provider of choice?

**Wrap-up: Interviewer asks for further comments or suggestions. Interviewer states that a summary of the research results will be sent upon completion of the study, then thanks the interviewee and ends the interview.**