

Development and Implementation of QUEST: An Examination of Challenges and Results

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Objective of Presentation

To describe:

- System development process for QUEST (Quality Evaluation System)
- Challenges in arriving at a standardized monitoring process for telephone and field surveys
- Technical and operational solutions implemented
- Implementation of QUEST

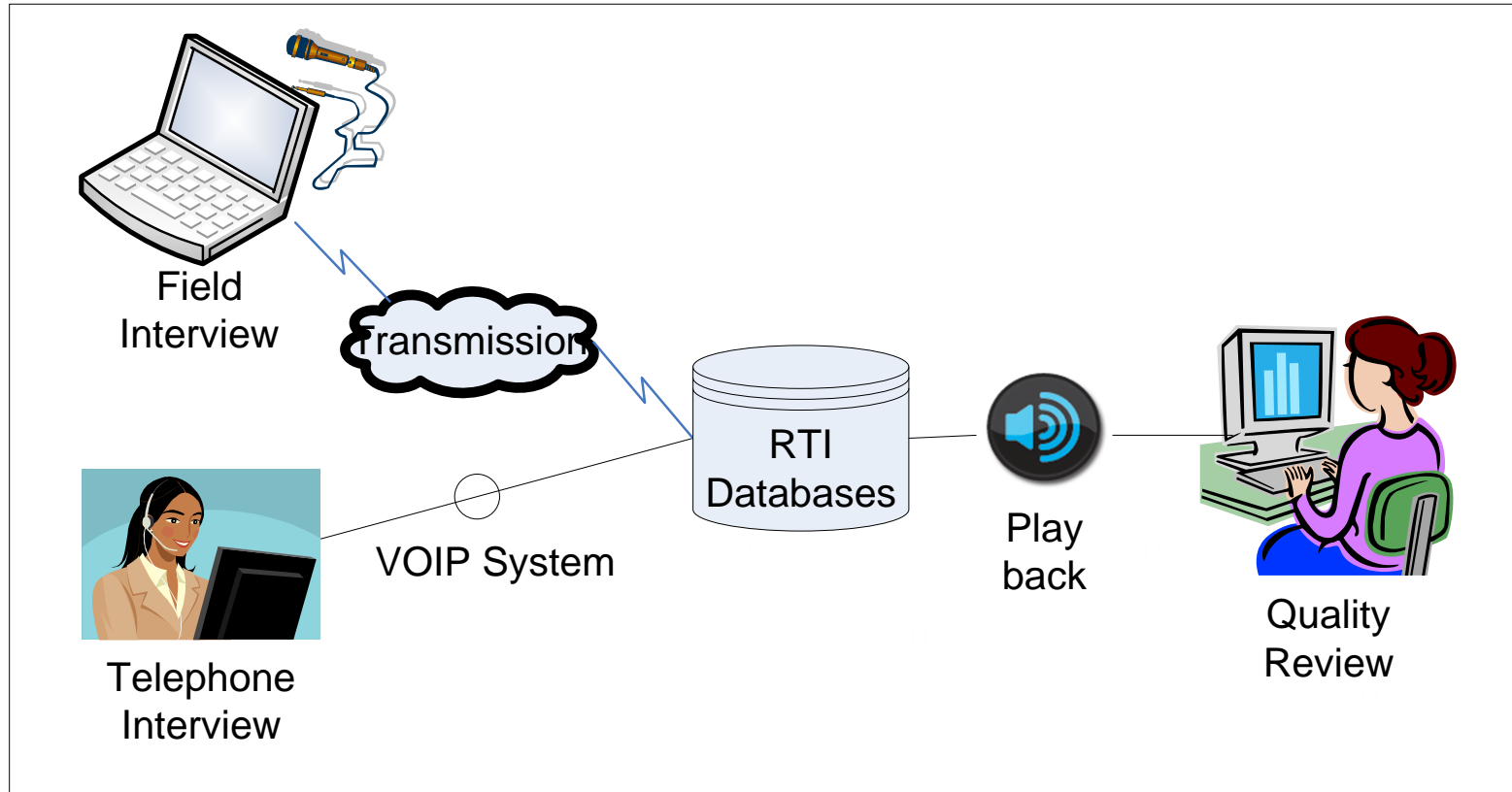
Overview of Presentation

- Objectives of QUEST
- QUEST System
 - Selection Rate; Monitor Utility; Audio File Management; Scoring; Feedback
- QUEST Challenges and Solutions
- Reports
- Plans for Future Developments

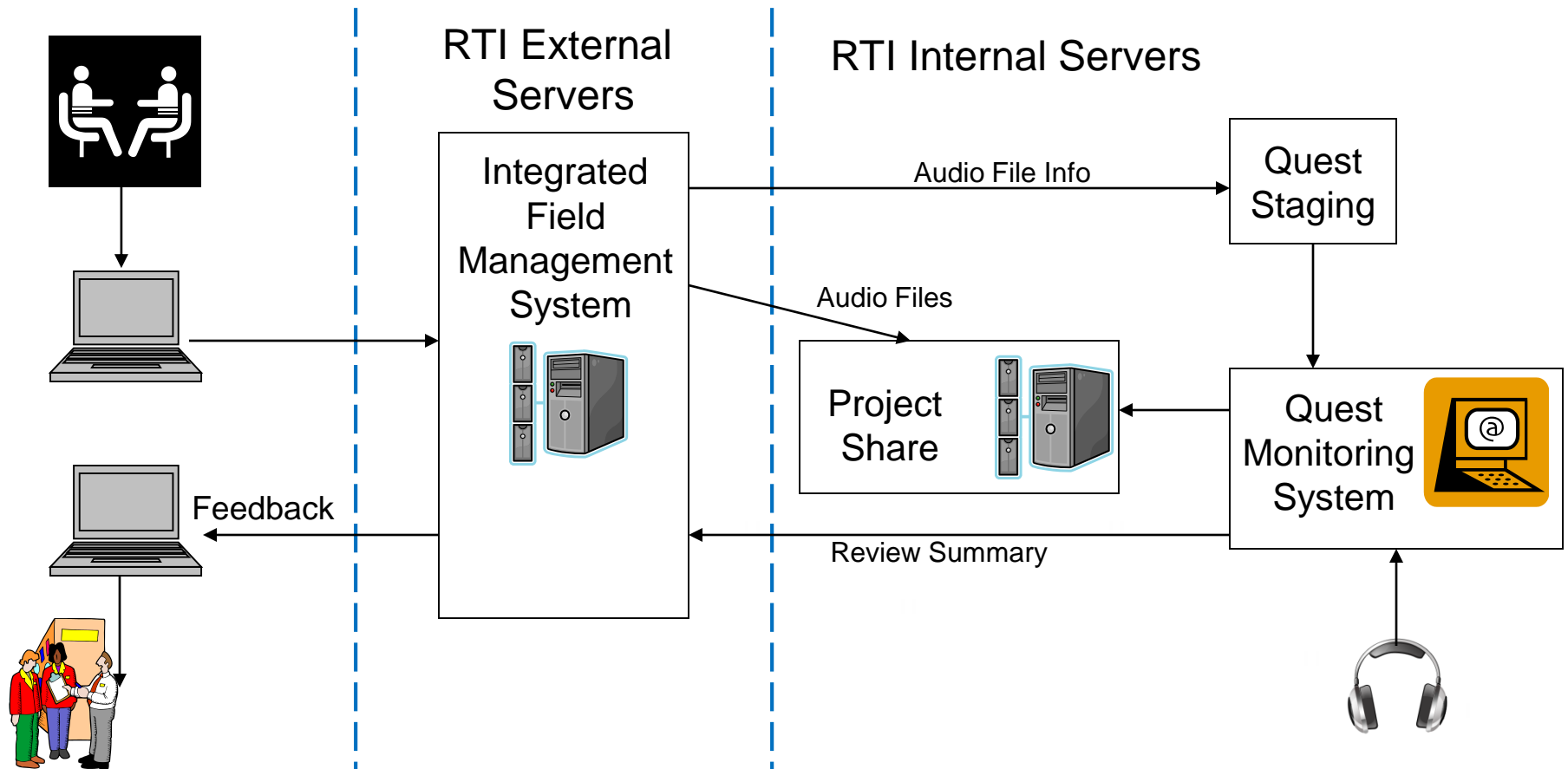
QUEST (Quality Evaluation System) Goals

- Develop standard quality monitoring system
- Increase use of CARI technology
- Increase efficiency of monitoring operations
- Collect interviewer and survey item-level performance data within/across projects (trend data)
- Improve client access to interview data

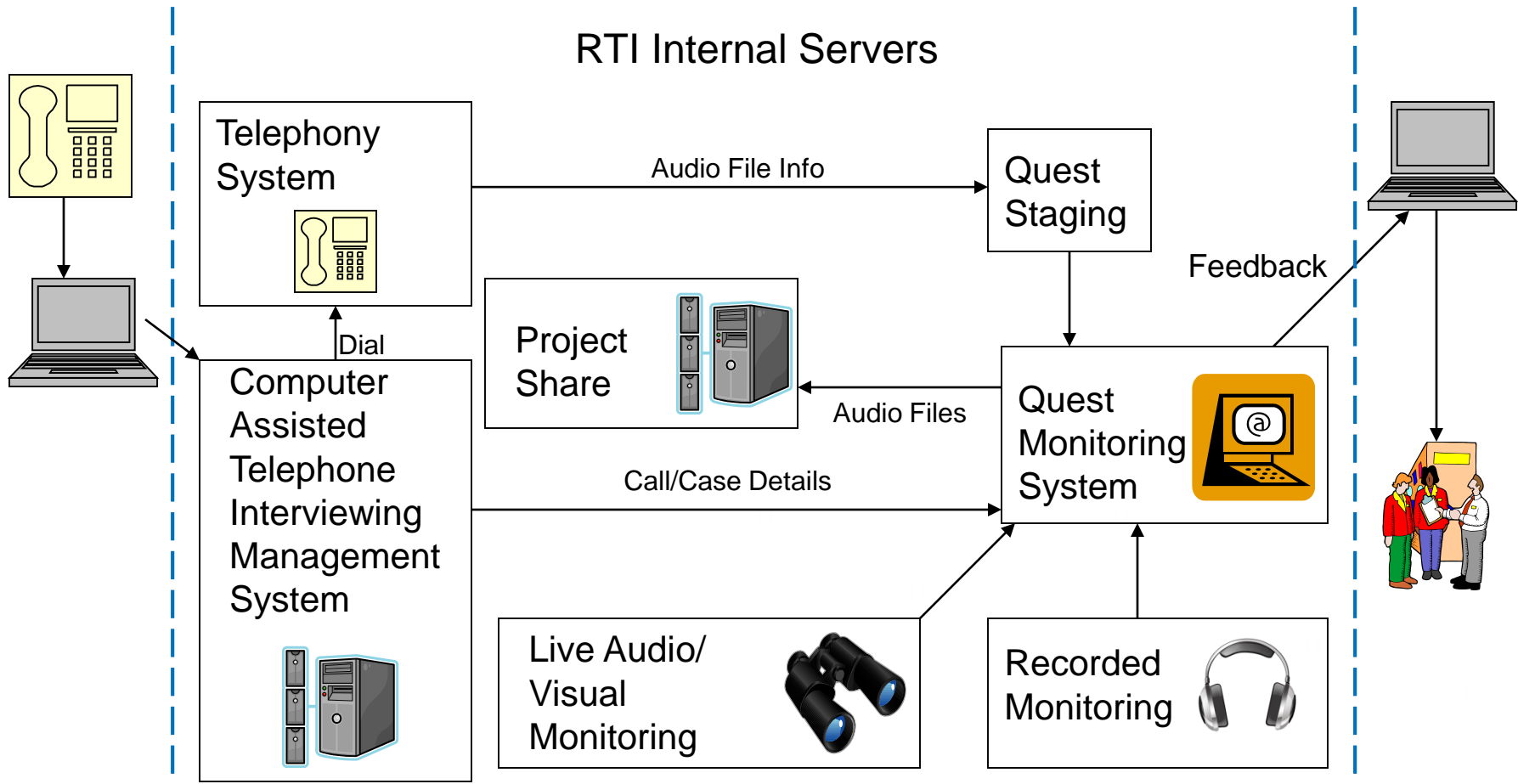
Conceptual View of QUEST Monitoring



Field Monitoring: Setup



Phone Monitoring: Setup



Selection Rate

- Minimum Standard of 10% - can be increased to meet project requirements
- Rate can vary by survey instrument within a project
- Telephone surveys – choice of review mode

Selection Rate (continued)

- Two algorithms for random selection for review
 1. Smooth selection over time
 2. Roll the dice for every interview
- Cases can be selected manually for review by monitoring staff

QUEST – Monitor Utility

- Recorded Interviews
 - Recordings stored on external file server
 - Links to recordings stored within case records
 - Monitors click on a link to access a recording
 - QUEST pre-selects interviews for review based on selection rate

QUEST – Monitor Utility (continued)

- Live Monitoring
 - Additional interface contains fields monitor must complete to begin session
 - Interviewer list displayed for monitor
 - Interviewers selected for monitoring session based on prioritization logic

Audio File Management

- Recorded files transmitted from field laptops
 - Single database holds information for multiple projects
 - Security is a key concern – we do not want all staff to see information in the database
 - Audio files stored on project share and accessed through website using windows network permissions

Audio File Management (continued)

- Recorded files within telephone survey instrument
 - Single file contains all recorded content for interview
 - Files stored on phone system server
 - Regularly scheduled updates create links to audio files
 - QUEST users access cases and click on a link to listen to recordings
 - Upon project completion, recordings are off-loaded from file server to corresponding project share

Scoring

- Three levels of scoring
 - Item Level
 - Block Level
 - Session Level
- Some item blocks and problem codes not applicable to all surveys
- Scoring rules stored in database tables

Feedback

- All monitor sessions require interviewer feedback
 - Telephone interview process
 - Field interview process

Challenges

- Managing audio files intake for projects and security of the files
- Selection review process
- Flexible scoring rules
- Reporting and providing feedback to interviewers
- System deployment
- System expansion/enhancement

Solutions

- Dual website deployment
- Processes to support live-only monitoring
- Reports to support field and phone only business needs
- Prioritization logic
- Processes for case assignments
- Capability to display/hide item blocks based on project type
- Modular design of evaluation form supports addition of supplemental item blocks

Reporting

- 14 online reports are currently available
- The reports are available on RTI's internal website.
- Review summaries, monitoring results, and block-level results – available at multiple levels
- System supports export of data to projects for customized reports

CARI Summary Status Report

CARI Status Summary Report

Status Code	Description	Case Count
11	Do Not Consider	17
20	Selected -Review Pending	57
21	Considered, but not Selected	826
22	Review In Progress	1
23	Review in Progress - Spanish	4
25	Supervisor Review Pending	1
30	Review Complete	258

CARI Review Summary by Project

Review Completion Summary

Survey:

Report Date:

Review Summary: Project Totals

Time Span	Completed	Review Selected	Pending Review	Review Complete	Completed toDate	Review Selected toDate	Pending Review toDate	Review Complete toDate
January 2010	195	43	30	21	861	279	33	224
February 2010	205	43	39	30	1164	343	66	254
November 2009	48	8	8	21	362	176	160	21
December 2009	187	30	13	170	663	236	13	204

Review Summary by Interviewer

Review Completion Summary

Survey:

Report Date: :

Cumulative reviews of completed interviews for each interviewer

Interviewer ID	Completed	Selected for Review	Pending Review	Review Complete	Percent reviewed
ROB1	11	3	1	2	18.18
BAY1	3	2	2	0	0.00
FRE1	12	4	2	2	16.67
PIT1	5	3	1	2	40.00
BIS1	9	2	0	2	22.22
HIP1	19	3	1	1	5.26
GAR1	19	3	0	2	10.53
DIL1	3	2	1	1	33.33
DUP1	28	6	1	4	14.29
CAM1	2	2	1	1	50.00
MAY1	14	3	0	1	7.14
MOR1	11	2	0	1	9.09

Monitoring Results –Project Level

Survey:

QUEST Monitoring Results Report

Overall Monitoring Results – Project

Status	Description	N	%
1	Exceeded Expectations	4	0.30
2	Met Expectations	279	21.14
3	Did Not Meet Expectations	32	2.42

Monitoring Results –Interviewer & Supervisor Level

QUEST Monitoring Results Report

Survey:

Report Date:

Overall Monitoring Results – Interviewer

Select an FSID:

FSID	Interviewer ID	Status	Description	N	%
HIL1	ROB1	1	Exceeded Expectations	0	0.00
		2	Met Expectations	1	9.09
		3	Did Not Meet Expectations	1	9.09
	BAY1	1	Exceeded Expectations	0	0.00
		2	Met Expectations	0	0.00
		3	Did Not Meet Expectations	0	0.00
	FRE1	1	Exceeded Expectations	0	0.00
		2	Met Expectations	0	0.00
		3	Did Not Meet Expectations	2	16.67
	PIT1	1	Exceeded Expectations	0	0.00
		2	Met Expectations	0	0.00
		3	Did Not Meet Expectations	2	40.00
	BIS1	1	Exceeded Expectations	0	0.00
		2	Met Expectations	1	11.11
		3	Did Not Meet Expectations	1	11.11

Block Level Results – Project Level

QUEST Monitoring Results Report

Survey:

Report Date:

Overall Block-Level Results – Project

Category	Status	Description	N	%
AUTHENTICITY	10	Did Not Consider	0	0
	110	No Errors	261	22.1561969439728
	210	Some Errors	0	0
	310	Excessive Errors	0	0
CASE MANAGEMENT SKILLS	15	Did Not Consider	255	21.6468590831918
	115	No Errors	6	0.509337860780985
	215	Some Errors	0	0
	315	Excessive Errors	0	0
INITIAL CONTACT	20	Did Not Consider	1	0.0848896434634974
	120	No Errors	254	21.5619694397284
	220	Some Errors	4	0.33955857385399
	320	Excessive Errors	2	0.169779286926995
KEYING SKILLS	25	Did Not Consider	255	21.6468590831918
	125	No Errors	6	0.509337860780985
	225	Some Errors	0	0
	325	Excessive Errors	0	0
READING SKILLS - Conventional Interviewing	30	Did Not Consider	0	0

Block Level Results – Project Level (continued)

FEEDBACK SKILLS	45	Did Not Consider	0	0
	145	No Errors	260	22.071307
	245	Some Errors	1	0.0848896
	345	Excessive Errors	0	0
PRESENTATION SKILLS	50	Did Not Consider	0	0
	150	No Errors	260	22.071307
	250	Some Errors	1	0.0848896
	350	Excessive Errors	0	0
PROFESSIONAL BEHAVIOR	55	Did Not Consider	0	0
	155	No Errors	261	22.156196
	255	Some Errors	0	0
	355	Excessive Errors	0	0
INTERVIEW PROTOCOL	60	Did Not Consider	0	0
	160	No Errors	251	21.307300
	260	Some Errors	6	0.5093378
	360	Excessive Errors	4	0.3395585
EXCEPTIONAL ITEMS	65	Did Not Consider	0	0
	565	Some Exceptional Behaviors	5	0.4244482
	465	No Exceptional Behaviors	256	21.731748

Additional Reports

- Problem Tally Report
- Authenticity Report
- Block Level Report by Monitor
- Monitor Review Completed Report
- Monitor Review Overdue Report

Future Directions

- Use of single QUEST website
- Video screen capture
- Behavioral Coding
- Automated verification of authenticity using speech analytics
- Expanded capabilities for additional data collection tasks (ex: help desk; tracing)

Questions or Comments?

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