



# Improving Interviewer Performance Using CARI

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# Outline

- CARI and Interviewer Performance
- RTI Coaching
- Behavior Coding, QA, and Coaching
- BOC System
- Future

## CARI and Interviewer Performance

- Gain awareness of performance
- Spot trends in performance
- Provide evidence for feedback
- Measure response to training
- Identify targeted needs
- Objective comparisons across interviewers and survey modes



# CARI and Interviewer Performance

- Census Bureau field test for Coaching will start in May 2012.
- Expect situations such as the following:
  - Good job: Interviewer keeps respondent on task, in spite of environment (children, dogs, phone calls, television...)
  - Bad job: Interviewer stumbles over wording or omits words
  - Good job: Interviewer provides clear explanation to respondent question
  - Bad job: Interviewer cuts off the answer before the respondent is done talking

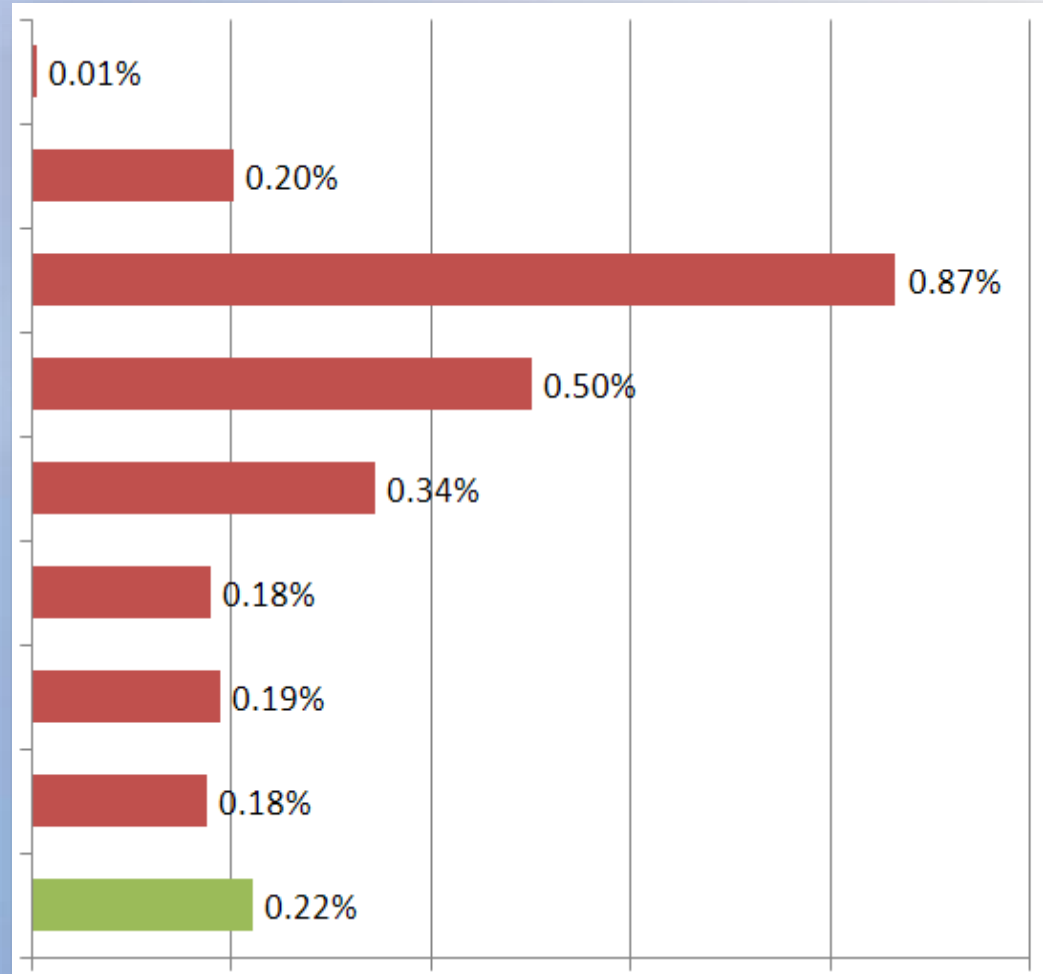
# CARI and Interviewer Performance

- Useful for detecting many types of error
  - Authenticity
  - Interview errors
  - Protocol errors
  - Keying / Data entry
- Errors are linked to the specific case and question where they occurred
  - Isolated to a particular case, or seen in many cases
  - Specific to particular question, or seen repeatedly
  - Having data allows issues to be identified as one-time, occasional or frequent



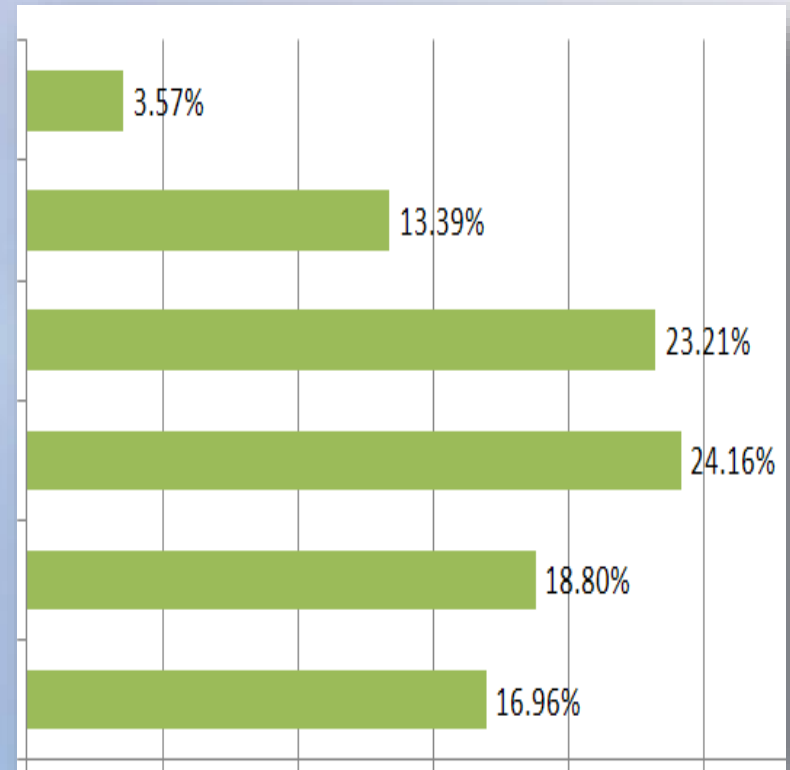
# RTI Coaching: Error Detection

- Authenticity
- Keying errors
- Reading errors
- Probing errors
- Non-neutral feedback
- Presentation
- Unprofessional behavior
- Protocol errors
- Exceptional behavior



# RTI Coaching: Recognizing Good Performance

- Response to distress
- Response to difficult R
- Refusal conversion
- Difficult situation handled well
- FAQs used in exceptional way
- Superior interview administration



# Behavior Coding, QA, and Coaching

- The Census Bureau's CARI Interactive Data Access System contains 3 separate components:
  - Behavior Coding
  - Quality Assurance
  - Coaching
- Why? What's the difference?
- Largely due to needs of specific groups within Census
- Following slides will present basics of each





# Behavior Coding

- Focus on questionnaire
- Categories, groups and codes are about behaviors of Interviewer and Respondent
- Goal-specific rules
  - Codes can be select-one or select-all-that-apply
  - Groups can be coded multiple times
  - Handling of revisits
- Feedback to questionnaire designers



# Quality Assurance

- Focus on data quality
- Categories, groups, and codes are
  - Standardized to allow comparison across surveys and modes
  - Interested in sources of potential survey error
  - Assigned point values for computing Quality scores
- Goal-specific rules
  - Codes are select-one only
  - Must code all groups once, and once only
  - Authenticity rating
- Feedback to interviewers



# Coaching

- Focus on interviewer performance
- Categories, groups, and codes are
  - Very similar to Quality Assurance
  - Standardized to allow comparison across surveys
  - Somewhat broader to include interviewer behaviors not identified as sources of survey error (e.g. assessment of environment, use of job aids, etc.)
- Goal-specific rules
  - Codes are select-one only
  - Must code all groups once, and once only
- Feedback to interviewers



# Coaching

- Each recording is evaluated as a unit
- Categories and groupings represent a “survey” of I-R interaction
- Most groupings are evaluated on a 4 point scale (sometimes with a 5<sup>th</sup> N/A option)
- Quality scores from groupings are rolled up to category, then to recording, then to interviewer

# BOC System: Coding Page

**CARI**  
Interactive Data Access

Log Out

Workload

View All Questions

- + CNTR100010
- CNTR100020
  - ✓ [1] - ENGLISH\_L...
  - ⚠ [1] - LOUDNESS\_...
  - [1] - ROOMNOISE...
  - [1] - COMMENT

Visual indicators of coding status

User: demo\_cd1      Component: Coaching      Survey Mode: Multi-Mode  
 Role: Coder      Survey Name: RTI Verification Survey1

<< Previous    Next >>    Save    Reset    Mark Case Complete

Coding    Question Text    Notes    Paradata    BC    QA

**Blaise Data Entry - \\rtpwil02\cai\_system**

Forms    Answer    Navigate    Options    Help

We need to categorize the loudness of the room  
 (INTERVIEWER: SELECT THE APPROPRIATE)

Question	Recording Date Time
<a href="#">ENGLISH_LANGUAGE</a>	1/10/2010 12:46:41 PM
<a href="#">LOUDNESS_CLIENT</a>	1/10/2010 12:47:15 PM
<a href="#">ROOMNOISE_CLIENT</a>	1/10/2010 12:47:49 PM
<a href="#">COMMENT</a>	1/10/2010 12:48:15 PM

Categories	Location of interview	Privacy
Audio	LC3 Appropriate <input checked="" type="radio"/>	PV3 Very private <input type="radio"/>
Reading	LC2 Somewhat appropriate <input type="radio"/>	PV2 Somewhat private <input checked="" type="radio"/>
Interview administration	LC1 Not appropriate <input type="radio"/>	PV1 Not at all private <input type="radio"/>
Probing	LC0 N/A - Cannot be determined <input type="radio"/>	PV0 N/A - Cannot be determined <input type="radio"/>
Conduct		
<b>Environment</b>		
Other		

Codes: LC3   PV2                       

Notes: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam aliquam, ligula vitae pulvinar imperdiet, ligula

Add Coding Entry    Needs Secondary Review     Needs Questionnaire Review

Category	1	2	3	4	5	6	7	8	9	10	Notes
Audio	AA4										<a href="#">Edit</a>
Reading	Q3	R1	AE3								<a href="#">Edit</a>
Interview administration	S3	L3	P2								<a href="#">Edit</a>
Probing	D3	E3	I0								<a href="#">Edit</a>
Conduct	M0	G0	C0	B4	F4						<a href="#">Edit</a>

Tabs for easy access to information

Blaise screen image and audio on top

Groups and codes below

Dense but convenient

# BOC System: Coding Page

Question	Recording Date Time
<a href="#">ENGLISH LANGUAGE</a>	1/10/2010 12:46:41 PM
<a href="#">LOUDNESS CLIENT</a>	1/10/2010 12:47:15 PM
<a href="#">ROOMNOISE CLIENT</a>	1/10/2010 12:47:49 PM
<a href="#">COMMENT</a>	1/10/2010 12:48:15 PM

- Tabs for access to notes, case header info, results from other components
- Blaise screen image and audio playlist from entire case, to allow review of spillover discussions

# BOC System: Coding Page

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Probing	LC0 N/A - Cannot be determined <input type="radio"/>	PV0 N/A - Cannot be determined <input type="radio"/>
Conduct		
<b>Environment</b>		
Other		

**Codes:** LC3 PV2

**Notes:** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam aliquam, ligula vitae pulvinar imperdiet, ligula

Add Coding Entry  Needs Secondary Review  Needs Questionnaire Review

Category	1	2	3	4	5	6	7	8	9	10	Notes
Audio	AA4										<a href="#">Edit</a>
Reading	Q3	R1	AE3								<a href="#">Edit</a>
Interview administration	S3	L3	P2								<a href="#">Edit</a>
Probing	D3	E3	I0								<a href="#">Edit</a>
Conduct	M0	G0	C0	B4	F4						<a href="#">Edit</a>

Dynamic lists of coding groups, with a summary grid below



# BOC System: Coaching Reports

## General:

- [Survey Configuration](#)
- [Cases By Question](#)
- [Review and Query Data](#)

## Alerts:

- [Cases Needing Secondary Review](#)
- [Authenticity Alert](#)
- [Interviewing Quality Alert](#)
- [Laptop Technical Alert](#)
- [Questionnaire Review](#)

## Coding Management:

- [Overall Status](#)
- [Case Load By Coder](#)
- [Inter-Rater Reliability \(IRR\) Test Assignments](#)
- [Case Assignment History](#)
- [Restarted Cases](#)
- [Skipped Cases](#)
- [Multi-Site Coding Progress](#)
- [Monthly Review Completion for Survey](#)
- [Weekly Review Completion By Coaching Coder - Overall](#)
- [Weekly Review Completion By Coaching Coder - Survey](#)

## Managing Interviewers:

- [Team Summary](#)
- [Interviewer Performance](#)
- [Interviewer Detail](#)

## Coding Frequencies:

- [Frequency of Codes By Case](#)
- [Frequency of Codes By Coder](#)
- [Frequency of Codes By Question](#)
- [Frequency of Codes By Interviewer](#)

Many reports available:

- General
- Alerts
- Coding Management
- Managing Interviewers
- Coding Frequencies



# BOC System: Interviewer Detail Report

User: demo\_sp1  
Role: Supervisor

Component: Coaching  
Survey Name: RTI Verification Survey1

Survey Mode: Multi-Mode

## Report - Interviewer Detail

Survey Name:

Intv ID:

Include Multi-Intv Cases:

Filter

<u>Intv ID</u>	<u>Control Num</u>	<u>Intv Site</u>	<u>Multi-Intv Cases Included</u>	<u># Recordings</u>	<u># Coded Recordings</u>	<u>% Coded Recordings</u>	<u># Not Coded For Reason</u>	<u>% Not Coded Recordings</u>	<u>Conduct Score</u>	<u>Environment Score</u>	<u>Interview administration Score</u>	<u>Other Score</u>	<u>Probing Score</u>	<u>Reading Score</u>
intv004	<a href="#">CNTR100010</a>	Philadelphia	<input type="checkbox"/>	2	2	100	2	100	71	50	71	81.50	66.50	58.50
intv004	<a href="#">CNTR100150</a>	Philadelphia	<input type="checkbox"/>	1	1	100	1	100	42	33	75	33	42	42

- Report shows case-level detail with scores by category
- Team Summary report shows scores for multiple interviewers

## Future

- Coaching system ready for field test
  - Based on extensive discussion with future users
  - User acceptance of requirements
  - Will support Regional Offices (field) and Telephone Centers
- Upcoming modifications to accommodate Regional Office restructuring
  - New user roles
  - Will support dynamic matrix reporting structure
- More enhancements based on user feedback

## More Information

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