Survey Redesign Recommendations from a Survey of Data Collection Field Staff

Wallace Fraser, Tanisha Keller (Census Bureau)
Safia Abdirizak, Brandon Kopp, Adam Safir, Lucilla Tan (BLS)

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Introduction

- The CE Survey, like other large scale surveys, periodically conducts surveys with field staff

- Interviewers and supervisors are on the front lines in implementing survey changes/improvements
  - They can tell us what works and what doesn't
  - Their buy-in is important for successful implementation
  - Their ideas and suggestions are considered as we improve the survey
    - Followed by cognitive or field testing

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2015 Field Staff Survey

■ The focus of today's talk is the 2015 field staff survey – including both interviewers and supervisors

■ Prior surveys were conducted in 2009 and 2011, but with only interviewers and senior interviewers

■ The 2015 survey included questions on training, respondent burden, and the Gemini Project to redesign the survey

■ CE plans to use this feedback to improve training procedures, data collection processes, and the survey redesign protocol

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Presentation Outline

1. 2015 Field Staff Survey Overview

2. Gemini Project Overview

3. 2015 Field Staff Survey Results

4. Recommendations

1. 2015 Field Staff Survey Overview

Protocol

- The U.S. Census Bureau collected the data and monitored data collection through Google Forms

- An email request was sent to 1,169 field staff email addresses

- Staff were allotted 1-hour of work time for completing the survey

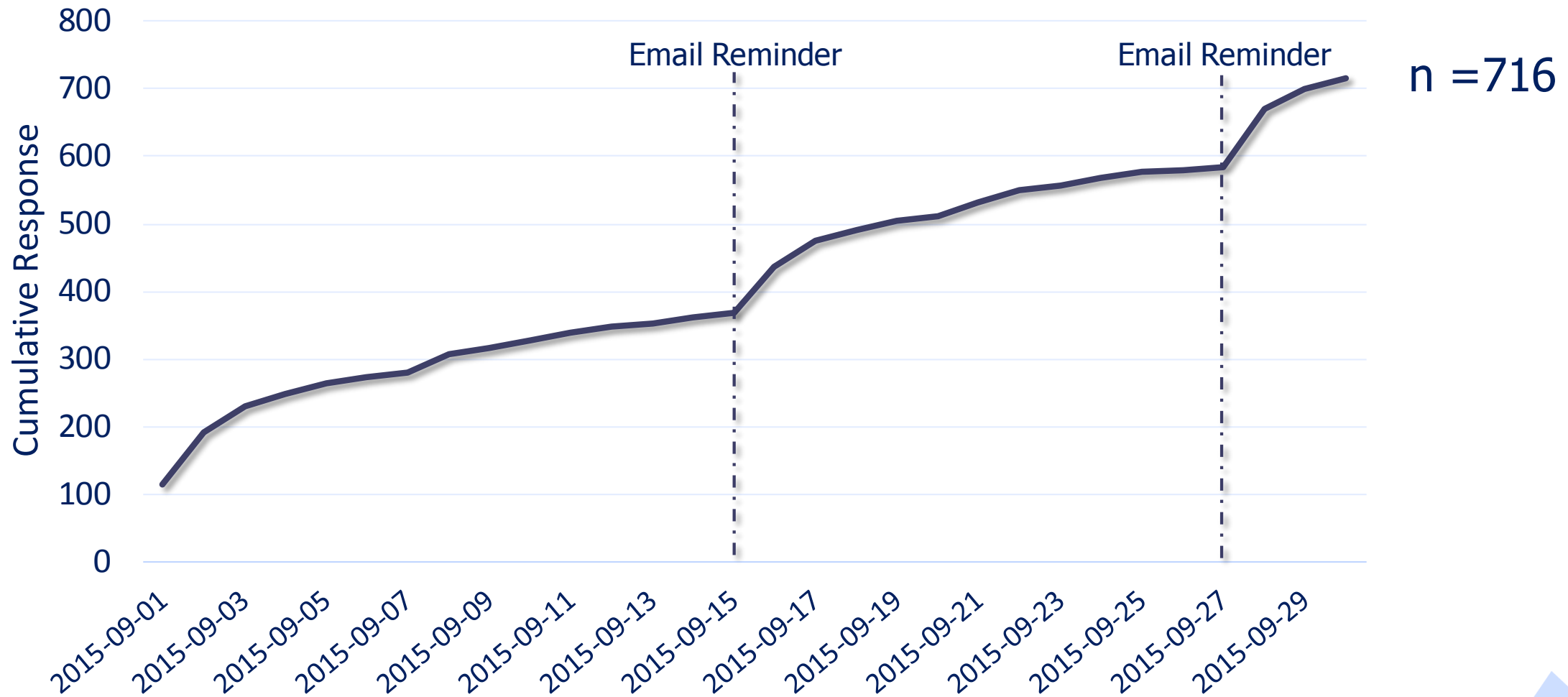- The data were screened for PII before delivery to BLS

Questionnaire

- **43 Questions**
  - ▶ 15 Open-ended
  - ▶ 28 Close-ended
- **7 Topics**
  - ▶ Demographics
  - ▶ Interviewer Experience
  - ▶ Training
  - ▶ Respondent Burden
  - ▶ Contact History Instrument
  - ▶ Neighborhood Observation Instrument
  - ▶ Survey Redesign

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Data Collection and Response

n =716

2. Gemini Project Overview

Gemini Project Overview

- In 2013, CE proposed a new design for the separate Interview Survey and Diary Survey, consisting of:

  1. One survey (in place of what is now two surveys, Interview and Diary)

  2. Online and paper diaries (in place of only paper)

  3. Two collection periods, one year apart (in place of 4 quarterly waves)

  4. Each collection period would include:

     a. A first interview collecting some recalled expenses, plus diary placement, a diary for each household member over the age of 15

     b. One week of diary keeping

     c. A second interview collecting expenses with records and diary pickup

     d. Incentives to complete the survey and adhere to protocols (e.g., record usage)
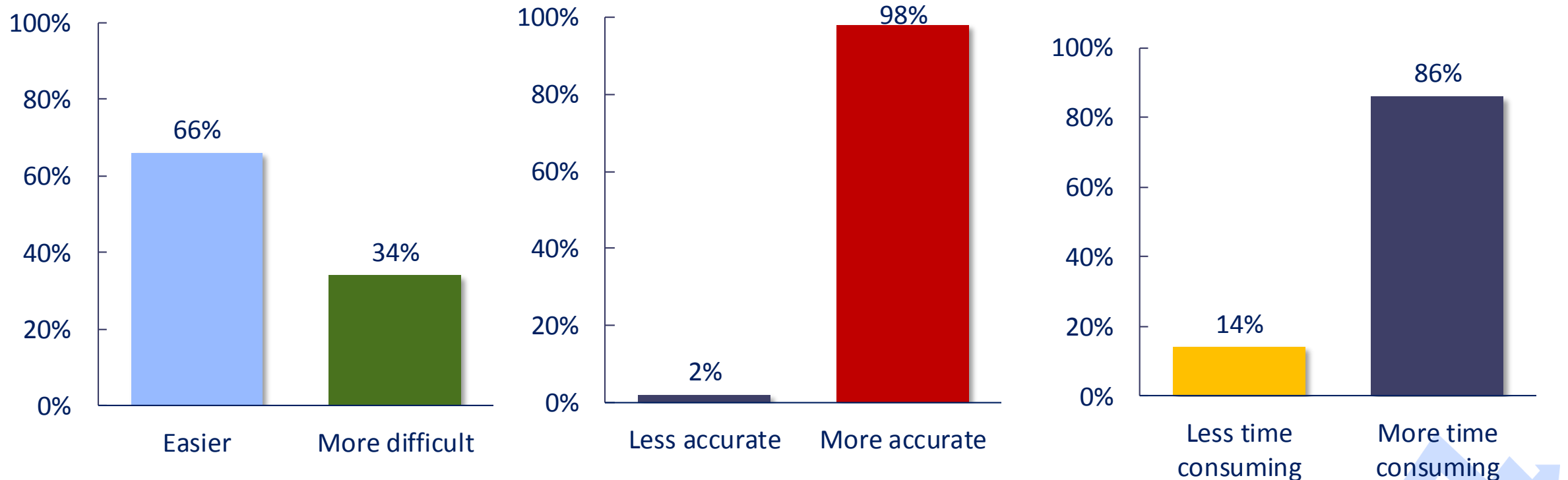
Gemini Project Related Questions

■ The field staff survey questionnaire included questions about the Gemini Project to identify potential concerns and suggestions on how to improve the CE survey from a field staff perspective

■ Examples:

▶ Records interview – Feasibility and sensitivity

▶ Incentives – Helpfulness of offering a token gift in gaining respondent cooperation

▶ Spending report summary – Helpfulness of a personalized pamphlet summarizing household expenditures in gaining respondent cooperation

▶ Technology – Respondent use of financial records via a computer, smartphone, or other electronic device during the interview
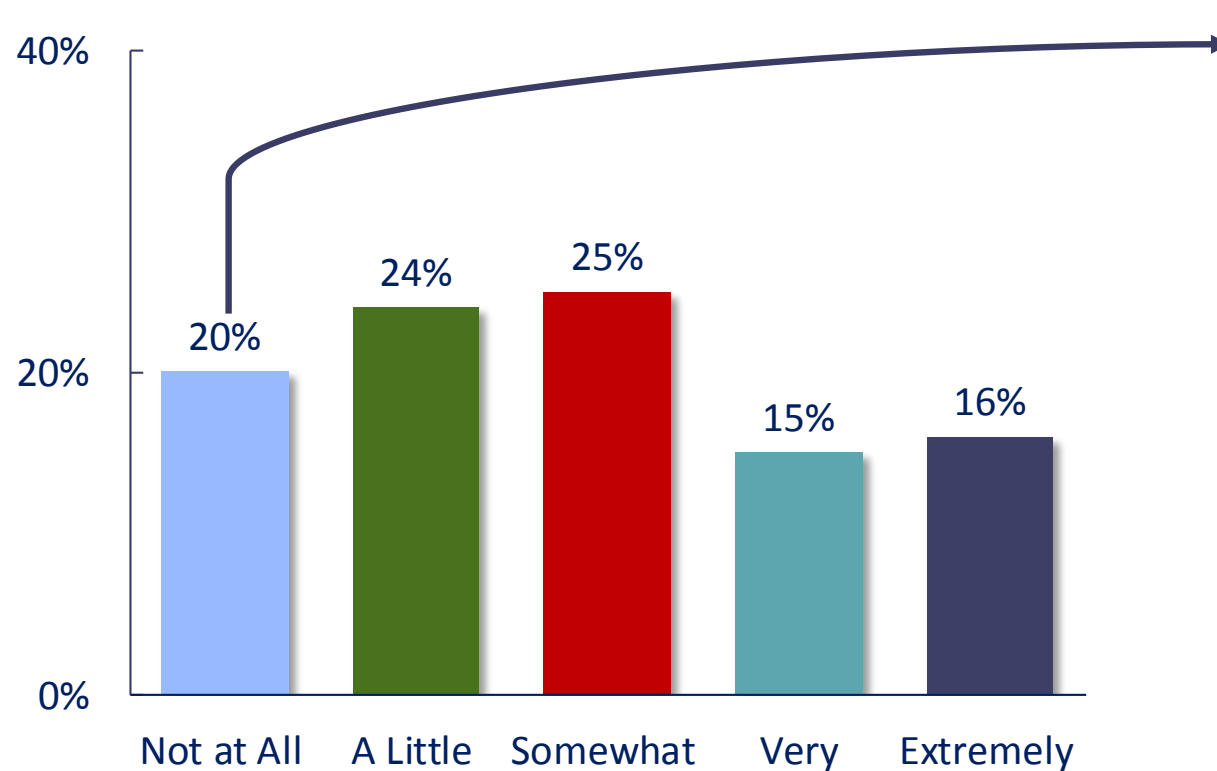
3. 2015 Field Staff Survey Results

Gemini Project: Record Use

■ Impact of financial record use on interview difficulty, accuracy, and length

▶ The majority of interviewers reported that using records made the interview process easier and more accurate but also more time consuming.
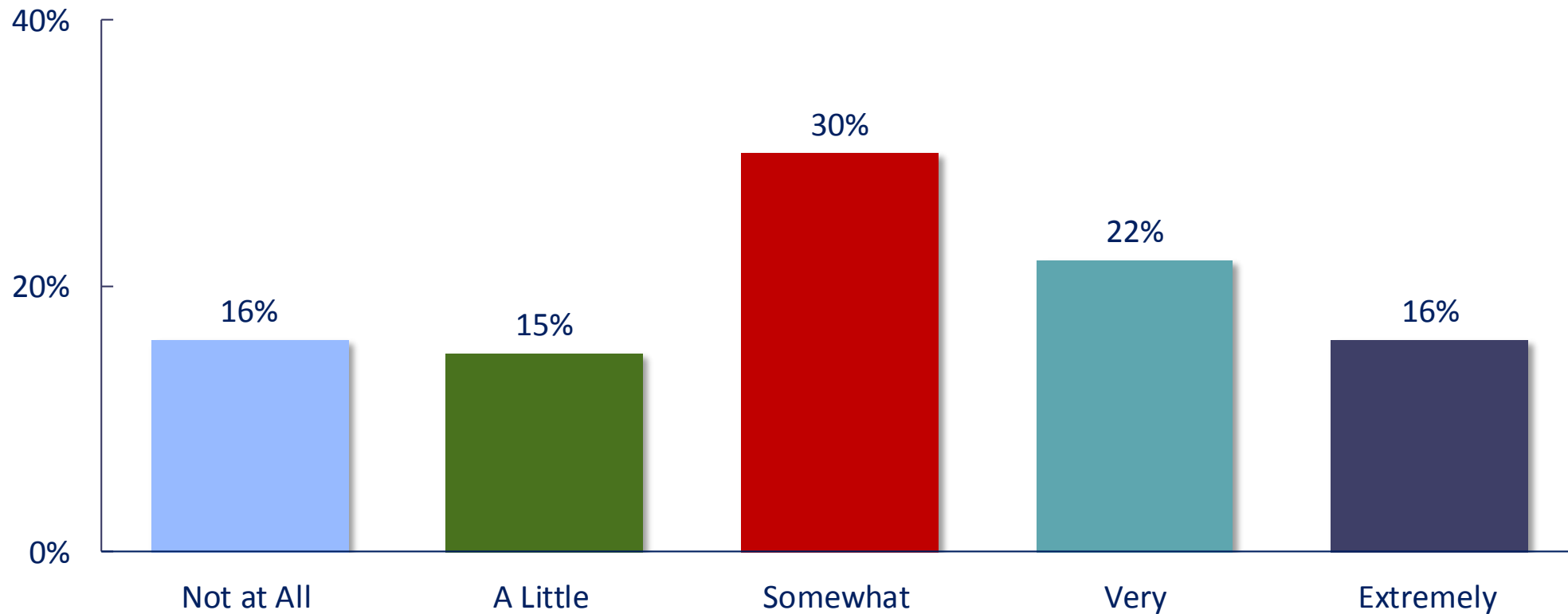
Gemini Project: Incentives

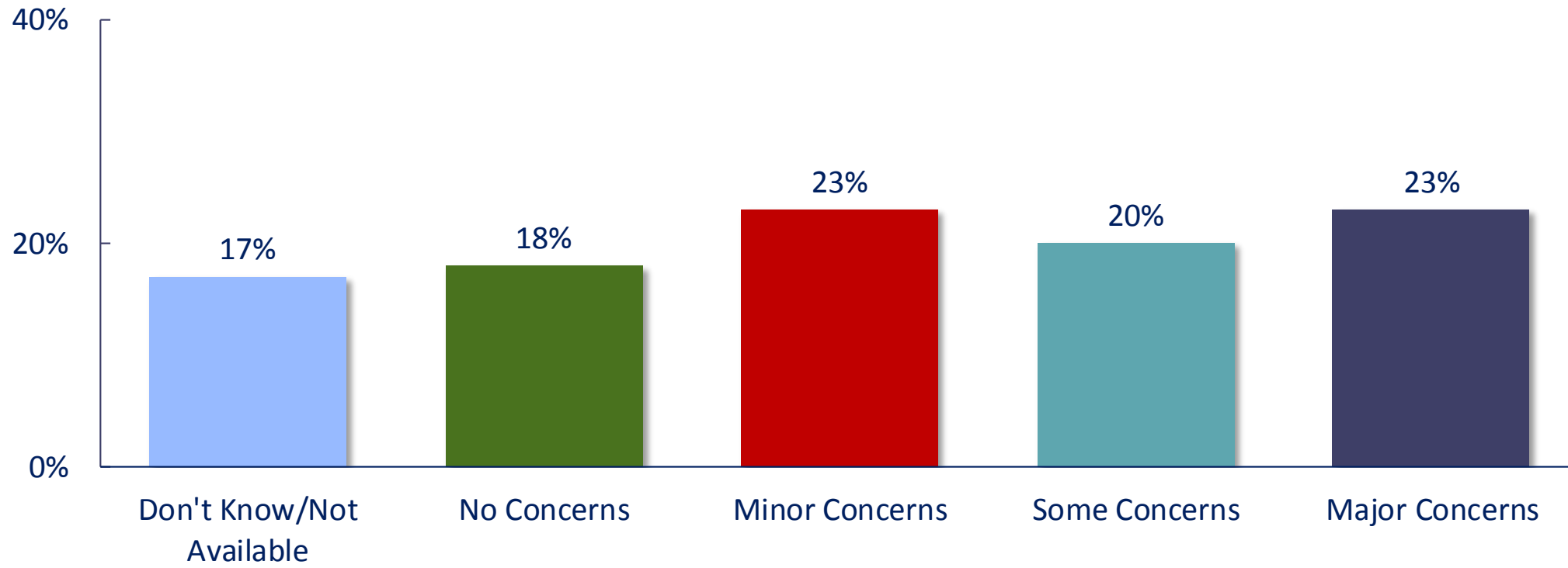■ How helpful would token incentives be in gaining respondent cooperation?

■ "I would not offer a [token incentive, like a] pen, or magnet, they would laugh at that."

■ "Offer cash incentives and people would do [the survey]!"

Gemini Project: Spending Report Summary

■ How helpful would an informational pamphlet outlining a respondent's reported response, compared to national averages, be in gaining respondent cooperation?
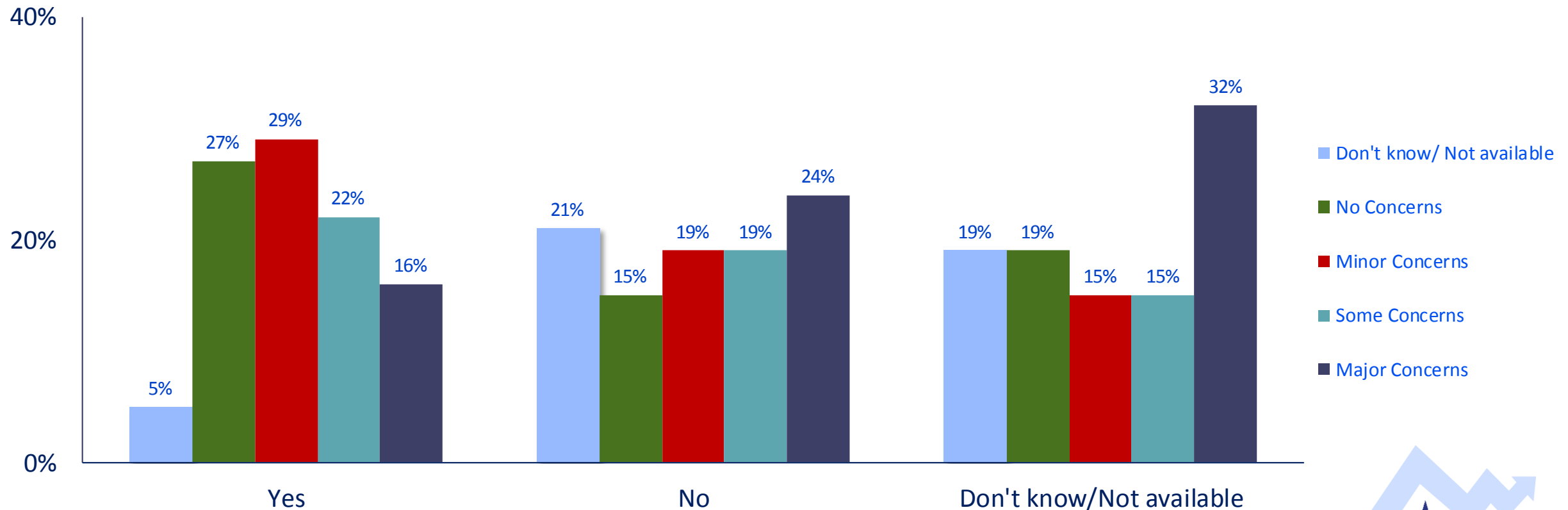

Not at All	A Little	Somewhat	Very	Extremely
16%	15%	30%	22%	16%

Gemini Project: Concerns about the Design

Gemini Project: Participation in Field Tests

■ Breakdown of feedback based on whether interviewer participated in redesign testing field tests

Legend:
- Don't know/ Not available
- No Concerns
- Minor Concerns
- Some Concerns
- Major Concerns

Yes: 5%, 27%, 29%, 22%, 16%
No: 21%, 15%, 19%, 19%, 24%
Don't know/Not available: 19%, 19%, 15%, 15%, 32%

Gemini Project: Selected Verbatim Comments

- **Interviewer feedback for why they had minor or no concerns:**
  - "I am part of the test doing that POC survey and it is MUCH easier to gain participation"
  - "I think combining the interview and diary into one survey may help interviewers see the point of the information they give."

- **Interviewer feedback for why they had concerns with proposed plan:**
  - "Picking up one diary is often difficult, picking up several in one household will greatly increase the time involved."
  - "It makes for hard feelings when a family member doesn't complete the diary and then doesn't get the debit card like on the [Proof of Concept Test] POC."

- **Interviewer suggestions for improvement:**
  - "Three major factors influence participation:
    - respondent selection - most people are skeptical of how they were selected to participate
    - time to complete the survey - the diary takes the least time and has a better success rate for [FR]
    - information collected - find a way to explain in greater detail and reassure interviewers that data collected is not used to create a 'personal profile' of the respondent."

4. Recommendations

Recommendations: General

- Review association between number of surveys worked and CE response rates, to gauge potential impact on CE sample performance measures

- Numerous suggestions for improving training, particularly in providing more time for:
  - Material covered
  - Answering questions and reviewing situations
  - Topics related to converting reluctant respondents
  - Training in the field (as opposed to the classroom)

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Recommendations: Redesign

- **Interviewer handling of respondent records**
  - ▶ Interviewers reported a preference for remaining with respondents when collecting information from their financial records
  - ▶ But in general are not comfortable handling the records themselves
  - ▶ Follow up about reluctance to handle records, and alternative approaches
- **Charter a team to review verbatim responses (out of scope for this team)**
  - ▶ Actionable items related to any of the survey topics
  - ▶ Specific concerns about the redesign, and recommendations for responding to those concerns, either in terms of redesign protocol changes, or as topics to focus on in interviewer training

Thank You