Planning and Performing Quality Control of Computer-Assisted Personal Interviewing

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Overview

- Why we perform quality control (QC) in Computer-Assisted Personal Interviews (CAPI)

- How we perform quality control
  - Notes review
  - Verification calls
  - Monitoring
  - Feedback

- Forecasting and planning quality control
Overview

• Why we perform quality control (QC) in Computer-Assisted Personal Interviews (CAPI)

• How we perform quality control
  • Notes review
  • Verification calls
  • Monitoring
  • Feedback

• Forecasting and planning quality control
Why we perform quality control

• Ensures high quality data for our clients
• Guards against data falsification
• Helps identify and correct data errors before data delivery
• Ensures high quality interviewers
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How we perform quality control

- Case Worked
  - Interview Complete
    - Notes Review
    - Verification Call
    - Monitoring
    - 1 on 1 Calls
    - Conference Calls
How we perform quality control: Notes Review

Case Worked

Interview Complete

Notes Review

Verification Call

Monitoring

1 on 1 Calls

Conference Calls
How we perform quality control: Notes review

- Closely examine all notes left in a case
- Review 100% of all case notes in Field
- Notes review identifies potential:
  - We use a Notes Review Database for notes within CASES instrument
How we perform quality control: Notes Review
How we perform quality control

Case Worked

Interview Complete

Notes Review

Verification Call

Monitoring

1 on 1 Calls

Conference Calls
How we perform quality control: Verification Call

1. Case Worked
2. Interview Complete
3. Verification Call
4. Notes Review
5. 1 on 1 Calls
6. Conference Calls
7. Monitoring
How we perform quality control: Verification Call

• Were there any problems or concerns you had with the visit or the interviewer?
• Was the interviewer courteous and respectful?
• Did the interviewer speak clearly?
• Did the interviewer talk about themselves personally in a way that was unprofessional or a poor use of your time?
• The interviewer should have given you ____ cash to thank you for your participation. Did you receive that amount of cash?
• Is there anything else you would like to tell me about the visit?
How we perform quality control: Verification Call

Case Worked → Interview Complete → Verification Call → Notes Review → 1 on 1 Calls

Verification Call → Monitoring → Conference Calls
How we perform quality control
How we perform quality control: Monitoring

Case Worked

Interview Complete

Notes Review

Verification Call

1 on 1 Calls

Monitoring

Conference Calls
How we perform quality control: Monitoring

Create New QC Records

- Project: P1224: WiscFams Year 2
- Project Instrument: WiscFams Year 2
- Review Type:
- Complete Date From:
- Complete Date Through:
- Interviewer:
- Case ID:

<table>
<thead>
<tr>
<th>Selected</th>
<th>Case ID</th>
<th>Iv ID</th>
<th>Interviewer</th>
<th>Complete Date</th>
<th>Recording Permission</th>
<th>CAPI by CATI</th>
</tr>
</thead>
</table>

Random Selection %: [ ]
How we perform quality control: Monitoring

- Interviewer protocols
- Standardized Interviewing
- Interviewer administration
- Study specific protocols
How we perform quality control: Monitoring

<table>
<thead>
<tr>
<th>Overall Performance</th>
<th>Exceeds Standards</th>
<th>Meets Standards</th>
<th>Needs Improvement</th>
<th>Unacceptable</th>
</tr>
</thead>
</table>

Comments

Set Status: Pending

- Pending
- Initial Review Complete
- Review Complete
How we perform quality control: Monitoring

- Case Worked
  - Interview Complete
    - Notes Review
    - Verification Call
      - Monitoring
      - 1 on 1 Calls
      - Conference Calls
How we perform quality control

Case Worked → Notes Review → 1 on 1 Calls

Interview Complete → Verification Call → Conference Calls

Monitoring
How we perform quality control: Feedback

- Case Worked
- Interview Complete
  - Notes Review
  - Verification Call
  - Monitoring
  - 1 on 1 Calls
- Conference Calls
How we perform quality control: Feedback

• One-on-one Calls
  • 1 Interviewer + 1 Supervisor
  • Weekly at a set time
  • 30 minutes to over an hour

• Conference Calls
  • All Interviewers for a project + Available Supervisors
  • Weekly at a set time
  • 30 minutes to over an hour
How we perform quality control: Feedback

- Case Worked
- Interview Complete
- Notes Review
- Verification Call
- Monitoring

1 on 1 Calls

Conference Calls
How we perform quality control: Feedback

Case Worked

Notes Review

Verification Call

Monitoring

1 on 1 Calls

Interview Complete

Conference Calls
How we perform quality control: Feedback
How we perform quality control

Case Worked → Interview Complete

Notes Review → Verification Call → Monitoring

1 on 1 Calls

Conference Calls
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Forecasting and planning quality control

- Initial meetings with CAPI Supervisors and Project Director
- Discuss scope of project and develop plan: Which QC methods to use?
- Typical

  ![Diagram of typical process]
  
  - Interview Complete
  - Audio Recording
  - Monitoring

- Atypical

  ![Diagram of atypical process]
  
  - Interview Complete
  - Audio Recording?
  - Monitoring
Forecasting and planning quality control

• Frontload monitoring effort
  • 18-25% of completed interviews monitored in initial weeks of data collection
  • Ensure every interviewer delivered feedback in first three weeks

• Average monitoring interviewers 1x per month
  • Varies based on field period & sample size
  • Prioritize those with lower scores

• 10% completed interviews monitored overall by end of field period
Forecasting and planning quality control

• Midlife in the United States – Milwaukee Subsample
  • Interviews average over 2.5 hours, the longest being just under 7 hours
  • After full monitoring of first several interviews, shorten the QC Monitoring by sections:
    • Certain sections are mandatory to QC in every monitoring
    • Other sections can be chosen by the person performing the QC
Forecasting and planning quality control

- Consolidate reporting into one central location:
  - Project Management Database (PMDB)

- Streamline QC & feedback process
- Better track trends we notice during QC and 1 on 1 calls
- More effectively track when interviewers need re-monitoring
Looking Ahead

• Review systems used for quality control to make most effective & efficient
Questions?
Thank You!

For copies of this presentation or more information, contact:

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