



SRO QC Lunch & Learn: Interviewer Behavior

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QC Lunch & Learn Series

1. Overview of QC at SRO – Monday, April 19 - 12:00 noon

This session will introduce you to the QC Implementation Team, quality control philosophy, and will provide an overview of quality control processes for interviewer-administered data collection at SRO.

1. QC Technical Systems and Tools – Thursday, May 6 - 12:00 noon

This session will introduce the technical systems and quality control tools used for recording interviews, completing evaluations and verifications, and reporting QC results.

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Agenda

- SRO QC Philosophy
- How SRO measures adherence to rules of standardization
- Putting into practice:
 - Evaluation
 - Retraining
 - Verification
- Supporting the interviewers



What is QC at SRO?

- **Evaluation** of recorded interviewer- administered interviews
- **Feedback and training** to interviewers
- **Verification** of completed interviewer-administered interviews



Goals of QC Process

- Ensure high quality data through standard administration of questionnaire
- Develop interviewers' skills:
 - Static standards
 - Dynamic application of GIT rules
 - Expertise in administering study-specific protocols
 - Rapport with Respondents



Measuring Interviewer Performance

Error ratio (ER):

- Proportion of evaluated questions with 1+ major error

Types:

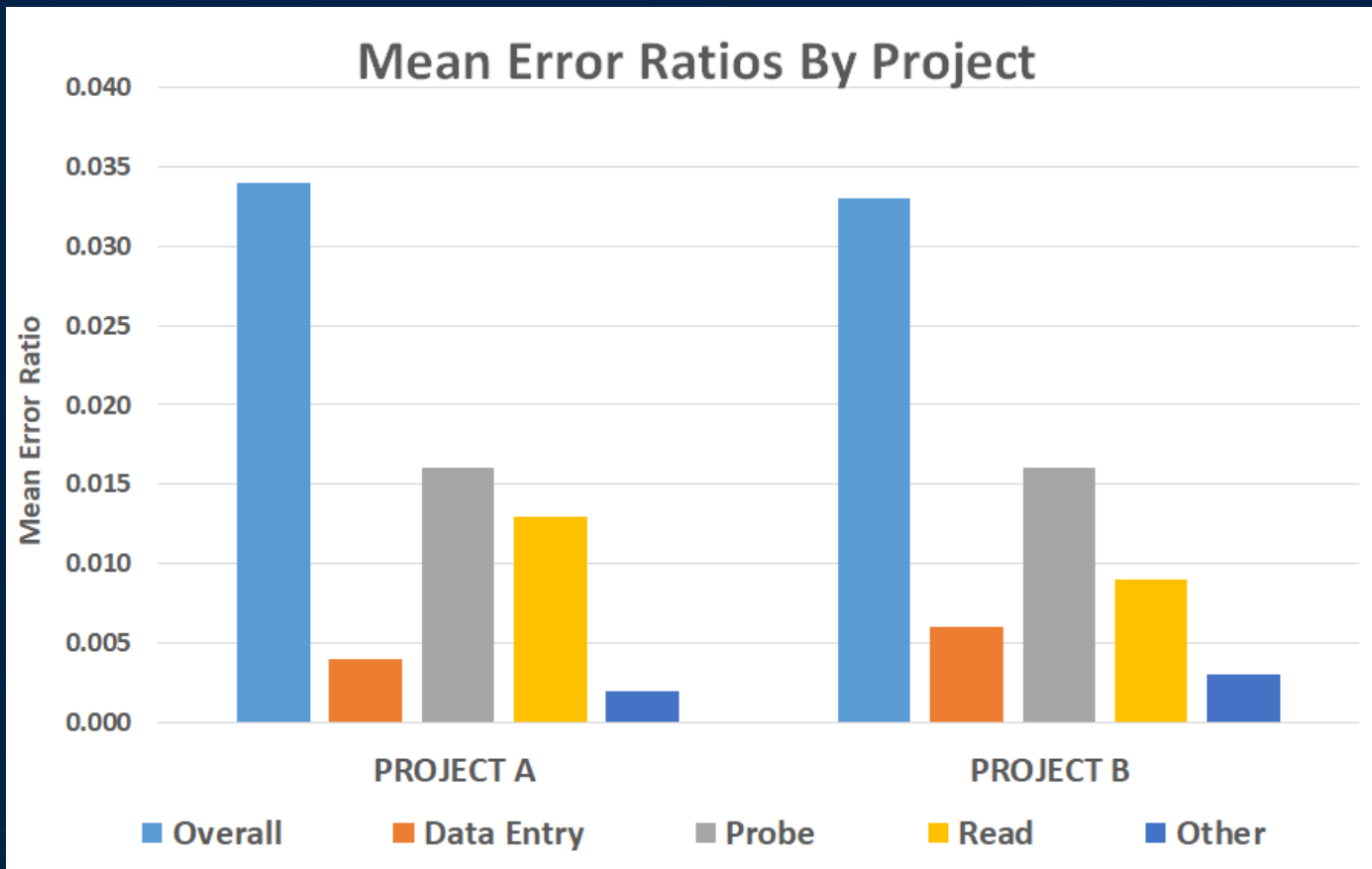
- Read, probe, data entry, feedback, other

Levels of analysis:

- Interviewer, group, project



Measuring Interviewer Performance





Measuring Interviewer Performance

Establishing Error Ratio Thresholds:

- QC standards
- Project Data
- Project significant questions
- Resources



Measuring Interviewer Performance

Threshold functions:

- Standardize
- Surveillance
- Signal

Considerations:

- Process improvement
- Resource balance



Operationalizing QC: Evaluators

How evaluators staffed:

- Selecting Team Members
 - Initial Application: experienced SRO lwers
 - GIT assessment
- Initial Training
 - QC Team Protocols
 - Technical Training
 - Mentor



Operationalizing QC: Evaluators

How evaluators are trained:

- Project Specific Training - flexible
 - Home Study
 - Project Manual Review
 - Round Robin (review section in eval list)
 - Study Specific Training (as needed)
 - Group Training - Led by Project's QC Coordinator
 - Project Overview
 - Review of Evaluation List
 - Project Significant Error
 - Train on Non-GIT Items in Evaluation List



Account



Dashboard



Courses



Calendar



Inbox



History



Commons



Help



Well-being

Dashboard Courses (1)



SRO Quality Control Project Traini...
QC Project Training



SRO Quality Control Calibration
Quality Control Calibration





Operationalizing QC: Evaluators

How evaluators maintain skills:

- QC Coordinator Support
- Q&A Doc
- On Going QC Training
 - IRR
 - Calibration
 - Ad Hoc Special Sessions and Team Meetings

Click on the project tab you are interested in viewing. Project tabs are also located at the bottom of this workbook.		Do not include Respondent PII on any spreadsheets.	
Active Projects	Archived Projects		
GIT/QC Team Questions	PSID 2019		
BFY	HRS 2018		
SCA	TAS 2017		
STARRS LS	PSID 2017		
DAWN	HRS 2016		



Case Selection and Retraining Flag

How evaluators select cases:

- OLIVE: Select next case in queue
- CARI/Camtasia: List of cases or recency

Cases Flagged for Retraining:

Sample lines exceeding any of these thresholds require verbal retraining

Error Thresholds	PctDataEntryErrors	PctFeedbackErrors	PctProbingErrors	PctReadingErrors	PctOtherErrors
	0.50%	0.50%	2.00%	2.00%	0.50%



Retraining

- Staff
 - Some do both (eval/retrain)
 - Bilingual
- Common protocol for delivering feedback
 - Attend Project QC Training
 - Access to project materials, including Q&A Doc
- Cases requiring verbal retraining identified through major error thresholds and project significant errors:

PROJECT: PSID 2021 / SID : 0656881 ➤

NoReply OLIVE

Go to <https://olive4.private.isr.umich.edu/Summary/TLSummary/?Id=842113> for details.

Type of feedback: verbal

Error: Project Significance, Data Entry, Probing

Language: English



Retraining

- New in 2020: encrypted video for sharing feedback
 - Allows Iwers to see and hear what occurred during the interview
- Efficiency
 - Iwers' retraining time = small fraction of overall cost
- Iwers' perception of value of one-on-one retraining



Retraining Protocol Explorations

Aims:

- Inform retraining
- Areas for improvement

Example from large, SRO study:

- Threshold vs. standard retraining
- Performance and cost indicators
- Interviewer feedback



Eval time frame

Once loaded into OLIVE, how quickly do cases get evaluated?

Goal - One Week

PM Review - Requires additional time to finalize case.

How quickly should verbal retraining take place?

Goal - Three Days



Operationalizing QC: Verification

Verification:

- Deter data falsification
- 99% do not fail
- Respondent feedback on lwer behavior

Operations

- Cases loaded 2/wk, complete w/in 14 days
- Code out as call limit met
- Scored in OLIVE; discrepant and fail scores adjudicated
- Challenges of Ver on panel vs. screening effort
- Generally, 5-10% flagged for Ver; cases replaced if unable



Verification Interviewer Question

Standard verification question:

In your opinion, did the interviewer conduct himself/herself in a professional manner?

Could you tell me more about this?

Displayed in OLIVE and shared with interviewer

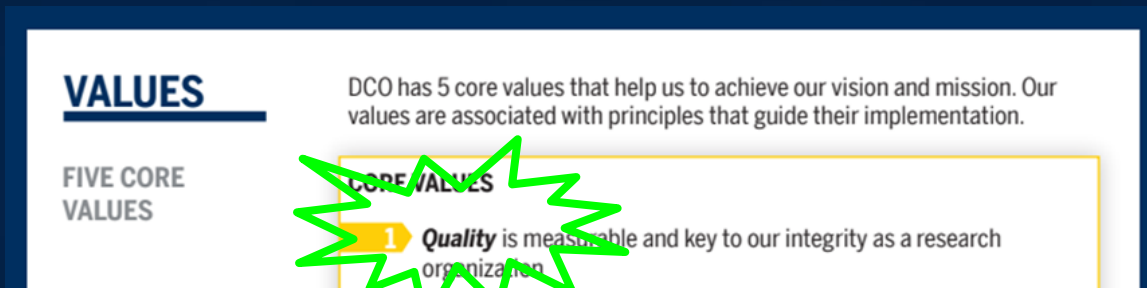
Almost always positive



Supporting Interviewers

QC starts at training

- GIT and study specific
- DCO Vision, Mission, and Values



- Work within their team (TL feedback about quality, performance)



Supporting Interviewers

- Formal feedback and retraining
 - OLIVE email
 - Details, including comparison grid to team
 - Initial eval once launch production -- early feedback to lwer, intensive time for eval/retrainers
 - Random flag, add'l cases due to QC concerns
 - Retrain interaction: one-on-one
 - Ver feedback on performance
- Organizational goal is to improve performance over time



Areas for Improvement/Next Steps

- Include QC in FY22 Iwer Satisfaction Survey
- Strengthening GIT and QC feedback loop
- Continue to build culture of continuous learning and improvement; combat Iwers' sense of QC as punitive
- Build efficiencies in retraining process



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Questions?



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