

Tracking Project Progress in Real Time

Betsy Blunsdon and Ken Reed
Deakin Computer Assisted Research Facility
Deakin University, Melbourne, Australia

Background

- Our shop
- Need to 'automate'
 - Efficiency
 - Effectiveness
 - Service
 - Performance and feedback
 - Staff motivation

Effectiveness and efficiency ...

- Clients
 - Daily tracking of study progress and time-line
 - Completion rate on daily/hourly basis
 - Notes and need to convey specialised information
- How did we do it before? (labour intensive, subject to error)
- How do we do it now?

Client: CADI Running Progress

AuSSA Status Report

Running Progress

Day	Month	Year	Number of events	Sample	Job	Type of job
11	July	2007	1333	AuSSA Questionnaire A	Mail	Pre-letter
12	July	2007	1333	AuSSA Questionnaire A	Mail	Pre-letter
13	July	2007	1333	AuSSA Questionnaire A	Mail	Pre-letter
13	July	2007	3	AuSSA Questionnaire A	Return	Return To Sender
16	July	2007	1	AuSSA Questionnaire A	Special Contact	Phone Call
16	July	2007	1333	AuSSA Questionnaire A	Mail	Pre-letter
17	July	2007	1	AuSSA Questionnaire A	Special Contact	Phone Call
17	July	2007	1335	AuSSA Questionnaire A	Mail	Pre-letter
18	July	2007	3	AuSSA Questionnaire A	Special Contact	Phone Call
18	July	2007	3	AuSSA Questionnaire A	Return	Return To Sender
19	July	2007	1	AuSSA Questionnaire A	Special Contact	Phone Call
19	July	2007	1	AuSSA Questionnaire A	Return	Return To Sender
19	July	2007	1526	AuSSA Questionnaire A	Mail	Survey Package
20	July	2007	3	AuSSA Questionnaire A	Special Contact	Phone Call
20	July	2007	4	AuSSA Questionnaire A	Return	Return To Sender
20	July	2007	2459	AuSSA Questionnaire A	Mail	Survey Package
23	July	2007	4	AuSSA Questionnaire A	Special Contact	Phone Call

Client: CATI Outcomes and Progress

NLC Panel Outcomes

Quick stats for shift: 2006-01-01 00:00:00 - 2007-05-06 23:59:59 In Zone: '0':

Last Case Started At: 2007-04-16 19:25:28
Completed cases average time: 56 Minute(s) 43 Second(s)

	Last Outcome
11 - Complete	1133
212 - Break-off	2
220 - Non-contact	26
221 - Respondent never available	0
230 - Other - Refer to supervisor	80
231 - Dead	2
232 - Physically or mentally unable	9
233 - Language	2
235 - CALLBACK ARRANGED	3
311 - Not Attempted (Not dialed)	0
313 - No answer	84
314 - Answering machine - Not a household	0
316 - Technical phone problem	0
410 - Out of sample	72
420 - Fax or data Line	21
432 - Disconnected number	22
441 - Number changed	15
451 - Business, government office, other organisation	18
2112 - Known respondent refusal	90
2221 - Voicemail: Message left	3
2222 - Voicemail: no message left	57

Outcome Rate	Rate
RR1	0.80640569395
RR2	0.808540925267
RR3	0.80640569395

Client: CADI Outcomes

AuSSA Status Report

AAPOR Outcome Codes and Rates

All 3 questionnaires

AAPOR outcomes (known)

Outcome	Number
Complete	8095
Non interview: (eg Dead,Language problem)	142
Refusal	2668
Unknown eligibility (eg Return to sender)	946

AAPOR Rates (assuming all unreturned: 8169 are unknown)

AAPOR Outcome Rate Type	Value
Response Rate 1	0.404345654346
Response Rate 2	0.404345654346
Response Rate 5	0.74232003668
Response Rate 6	0.74232003668
Cooperation Rate 1	0.74232003668
Cooperation Rate 2	0.74232003668
Cooperation Rate 3	0.75211372294
Cooperation Rate 4	0.75211372294
Refusal Rate 1	0.133266733267
Refusal Rate 3	0.244658413572
Contact Rate 1	0.544705294705
Contact Rate 3	1

Questionnaire A

AAPOR outcomes (known)

Outcome	Number
Complete	2786
Non interview: (eg Dead,Language problem)	36
Refusal	905
Unknown eligibility (eg Return to sender)	321

AAPOR Rates (assuming all unreturned: 2639 are unknown)

AAPOR Outcome Rate Type	Value
Response Rate 1	0.416629280694

Efficiency and effectiveness...

- Operators
 - Displays of daily progress (motivational)
 - Performance reports on a regular basis

Operator: Status Pages

NLC Completions This Time Yesterday

4

NLC Completions Today

3

NLC Completions YESTERDAY

22

NLC Cooperation Rate

The percentage of eligible respondents who complete the questionnaire

91.30%

Operator: Evaluation

NLC Questionnaire

INTERVIEWER EVALUATION

For 07-01-01 to 08-01-01

Interviewer: wglen

COMBINED OUTCOMES	OUTCOME DESCRIPTIONS	TOTAL CASES
Your Results		
Potential Interviews: <small>Cases where you spoke to someone who was eligible to complete an interview.</small>	Completed interview, Mail survey, Break-off during interview, Callback arrange, Eligible respondent refused.	235
Leads Created: <small>Cases where you arranged a callback or set up a mail survey.</small>	Callback arranged, Mail survey	179
No Eligible Respondent: <small>Cases where there was no way you could have completed an interview.</small>	Refer to supervisor, Physically or mentally unable, Language problem, Fax or data line, Disconnected number, Business or organisation number, No eligible respondent	1145
Still Trying: <small>Cases where we are still trying to reach a respondent.</small>	Not available when callback made, Number not dialled, No answer, Engaged, Answering machine: No message left, Answering machine: Message left	1629

COOPERATION	Your Average	Evaluation	Interviewer Average	Top Interviewer
Interviews	0.08	Above Average	0.07	tgeorge at 0.16
Leads	0.76	Above Average	0.72	niliias at 0.97
Total	0.84	Above Average	0.79	niliias at 0.98

HOURLY RATES	Your Average	Evaluation	Interviewer Average	Top Interviewer
Cases per hour	45.66	Above Average	40.37	margyle at 79.84
Interviews per hour	0.27	Above Average	0.26	smcentee at 0.52

[Back](#)

Efficiency and effectiveness...

- Supervisors
 - Ease in monitoring interviewer performance
 - Can figure out productivity by shift, interviewers
 - Makes tracking exceptional cases easier

Supervisor: CATI Outcomes

HELP	BUSINESS	STUDY MGMT	DATA/DISSEMIN.	INFRASTRUCTURE	SAMPLE MGMT	STAFF TRAINING	LOAD PROJECT	LOAD SAMPLE	
iss > StudyManagement > SurveyMonitor > Monitor > quickstats									Load Project
Survey Monitoring Centre									
Statistics for NLC Live Quick stats since first case(2006-09-25 11:08:14):									
Total Accesses:		241665							
Last Case Started At:		2007-05-03 13:43:23							
Completed cases minimum time:		1 Minute(s) 14 Second(s)							
Completed cases maximum time:		199 Minute(s) 30 Second(s)							
Completed cases average time:		59 Minute(s) 37 Second(s)							
Cumulative Last Outcome									
11 - Complete	3135	3133	<input type="button" value="Check"/>						
212 - Break-off	53	18	<input type="button" value="Check"/>						
220 - Non-contact	4315	1300	<input type="button" value="Check"/>						
221 - Respondent never available	12	8	<input type="button" value="Check"/>						
230 - Other - Refer to supervisor	1410	182	<input type="button" value="Check"/>						
231 - Dead	5	5	<input type="button" value="Check"/>						
232 - Physically or mentally unable	161	161	<input type="button" value="Check"/>						
233 - Language	586	586	<input type="button" value="Check"/>						
235 - CALLBACK ARRANGED	22689	32	<input type="button" value="Check"/>						
311 - Not Attempted (Not dialled)	25	1	<input type="button" value="Check"/>						
313 - No answer	117439	18915	<input type="button" value="Check"/>						
314 - Answering machine - Not a household	19	0	<input type="button" value="Check"/>						
316 - Technical phone problem	83	20	<input type="button" value="Check"/>						
410 - Out of sample	181	73	<input type="button" value="Check"/>						
420 - Fax or data Line	7411	7385	<input type="button" value="Check"/>						
432 - Disconnected number	2497	2472	<input type="button" value="Check"/>						
441 - Number changed	56	15	<input type="button" value="Check"/>						
451 - Business, government office, other organisation	29291	29262	<input type="button" value="Check"/>						

Supervisor: CATI Outcomes by Interviewer

HELP	BUSINESS	STUDY MGMT	DATA/DISSEMIN.	INFRASTRUCTURE	SAMPLE MGMT	STAFF TRAINING	LOAD PROJECT	LOAD SAMPLE
iss > StudyManagement > SurveyMonitor > Monitor > interviewer Load Project								
Survey Monitoring Centre								
Back								
Stats for Wendy Glen								
<u>Overall</u>								
Number of accessed cases:	8229							
Max time in case:	107 Minute(s) 31 Second(s) (639102 Hundredths)							
Min time in case:	0 Minute(s) 0 Second(s) (0 Hundredths)							
Average time in case:	2 Minute(s) 19 Second(s) (13937.9266 Hundredths)							
Total time interviewing:	319 Hour(s) 35 Minute(s) 51 Second(s) (114695198 Hundredths)							
<u>This study Overall (non completions only)</u>								
Number of accessed cases:	5352							
Max time in case:	67 Minute(s) 17 Second(s) (403791 Hundredths)							
Min time in case:	0 Minute(s) 13 Second(s) (1356 Hundredths)							
Average time in case:	1 Minute(s) 8 Second(s) (6855.0293 Hundredths)							
<u>This study Completed</u>								
Total Completed:	65							
Hit Rate:	0.01							
Max time in completed case:	107 Minute(s) 31 Second(s) (639102 Hundredths)							
Min time in completed case:	13 Minute(s) 40 Second(s) (76060 Hundredths)							
Average time in completed case:	54 Minute(s) 54 Second(s) (323440.0462 Hundredths)							
RR1:	0.0238611713666							
RR2:	0.0238611713666							
RR5:	0.0238611713666							
RR6:	0.0238611713666							
Quick stats since first case(2006-09-27 09:09:24) For interviewer: 'wglen':								
Total Accesses:	5417							
Last Case Started At:	2007-04-16 20:25:27							
Completed cases minimum time:	13 Minute(s) 40 Second(s)							
Completed cases maximum time:	107 Minute(s) 31 Second(s)							
Completed cases average time:	54 Minute(s) 54 Second(s)							
	Cumulative Last Outcome							
11 - Complete	65	65	<input type="button" value="Check"/>					
212 - Break-off	2	2	<input type="button" value="Check"/>					

Summary

- Our approach has been to develop tools to automate many supervisory and client relation interactions
- Advantages:
 - Clients and operators can access the information in real time
 - Less labour intensive and less subject to error
- Overall, have less contact with the client once the study is underway (a good thing or a bad thing?)