

Improving the Effectiveness of Interviewer Administered Surveys through Refusal Avoidance Training

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IFD&TC – May 20, 2008

My Background

- University of Maryland-JPSM
- Bureau of Labor Statistics
- Census Bureau
 - Interviewers and Survey Analysts
 - Primarily nonresponse follow-up calls
 - Establishment survey

What is Refusal Avoidance Training?

- Interactive
- Cooperative learning
- Flexible
- On going
- Provides telephone skills, refusal avoidance techniques, and improves communication

Background Research

Groves and Couper (1998)

Respondent-interviewer Interaction:

- Tailoring an interviewer's response
- Maintaining interaction with respondent

Background Research

Groves and McGonagle (2001)

- Unscripted portion of telephone calls
 - Introducing themselves
 - Beginning of scripted interview
- Impossible to script
- Make or break for response

Background Research

Several responses and quick reaction

- Assemble respondent concerns
- Develop responses
- Train interviewers to classify concerns
- Train interviewers to provide quick and appropriate responses

Refusal avoidance training modules

Module 1: Introduction

Module 2: Survey Specific

Module 3: Shared Experience

Module 4: Preparing a Telephone Call

Module 5: Telephone Skills

Module 6: Identify, Analyzing, and Dealing with
Reluctance and Refusal

Module 7: Recovering from Negative Calls

Module 8: Wrap-up and Evaluation

Module 1

Introduction

- Introduces training to interviewers
 - Introduces the trainer and interviewers to each other
 - Provides training schedule
- Mention breaks/ lunch and stick to it

Module 2

Survey Specific

- Often part of other training
- Introduces survey specific content
- Conducted by survey manager or survey staff

Module 3

Shared Experience

- Identify interviewers' biggest concerns and difficulties
 - Work together to develop solutions
 - Concerns are used in a later module
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- Learn concerns without complaints
 - Use their words when possible

Module 3 example

- Trainer: “What are some of the things respondents say when you talk to them?”
- Interviewer: “Why should I do this?”
- Group: Identify appropriate responses
- Trainer: Make sure identified concerns are addressed and adds new concerns to list

Module 4

Preparing for the Telephone Call

- Asks interviewers how they prepare for telephone calls
- Identify what interviewers do prior to placing a telephone call
- Transition between modules
- Moves thinking from abstract to concrete

Module 5

Telephone Skills

- Assess active listening skills
- Discuss tone
- Review mechanics of placing a telephone call
- Discuss effective voice mails
 - Focus on ideal phone calls
 - Break for lunch

Module 6

Identifying, Analyzing and Dealing with Reluctance and Refusal

- Discuss difference between reluctance and refusal
- Classify concerns identified in Module 3 as reluctance and/ or refusal
- Further discuss solutions
- Practice telephone calls

Module 6 example

Goal

- Most “bad” calls are reluctance
- True refusals are rare
- Reluctance and questions are good
- Reluctance, with right info, often equals complete

Module 6 example

Concern: Why should I do this

Training: “Is this a refusal or reluctance?”

Group: “Reluctance”

- Classify as many concerns as necessary to understand goals

Module 6: Practice Calls

- Over the telephone, not face to face
 - Made to others not in the training, instead of other trainees
 - I use my co-workers
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- Better simulates actual phone calls
 - Designed to be harder than actual calls
 - More concerns may arise

Module 7

Recovering from Negative Calls

- Discusses recovering from refusals and other negative calls
 - Helps interviewers to evaluate negative experiences
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- Transition from Module 6
 - Bad calls happen, learn from them

Module 8

Wrap-up and Evaluation

- Review main training points
 - Clarify any remaining concerns
 - Evaluations by interviewers
- Concerns are compiled into or used to update FAQ Job Aid

Why do we use it?

- Centralized dissemination of skills and information
- Practice occurs in a test environment
- Provides training at regular intervals
- Proactive training instead of reactive training
- Practice calls: hardest, most useful

Why do we use it?

- Communication between interviewers, supervisors, and survey managers
- Interviewers feel invested in data collection process
- Survey managers gain direct insight into data collection process

Costs

- Overall low maintenance training
- Staff time writing and delivering training
- Telephone coverage
- Monetary cost of training

Be Prepared

- Difficult to provide conclusive evidence if only measure is response rates
 - Experimental testing not feasible
 - May not be conclusive
- Interviewers challenge authority and knowledge

Thank You

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