

Module 4: Phone Interviews and Interviewers

Video 1 of 3: Module Overview and Interviewer Selection and Training

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Phone Interviewers

- Play a key role in data collection and have different responsibilities
 - obtaining interviews
 - conducting interviews
- Appropriate recruitment and interviewer training is essential to ensure high quality data

At the End of the Module Participants Should...

- ...know how to determine the composition of the interviewing staff for their study
- ...learn about effective practices for training interviewers
- ...be familiar with techniques for persuading sample units (e.g., households, firms, individuals) to participate in phone interviews
- ...know the guidelines for conducting standardized interviews

Interviewer Selection and Training

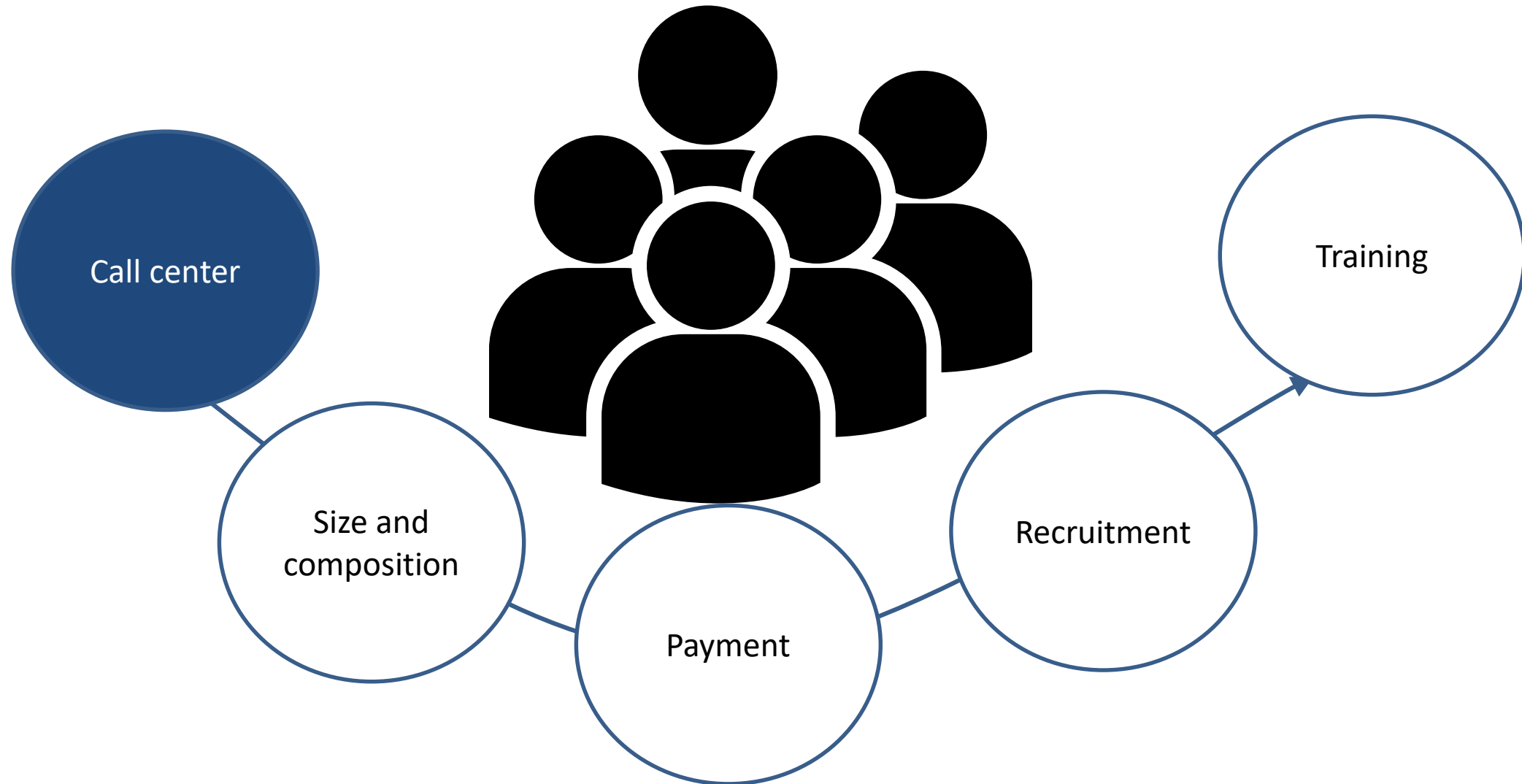
Phone Interviews and Interviewers



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Interviewing Staff: Decisions and Steps When Starting a Phone Survey



Fundamental Decisions for Setting up Call Center

- Hiring in-house team vs. outsourcing to professional call center
- Centralized interviewing vs. decentralized Interviewing

Hiring In-House Team vs. Outsourcing

- Decision depends on skills and resources available to the project
- Relative evaluation of each approach

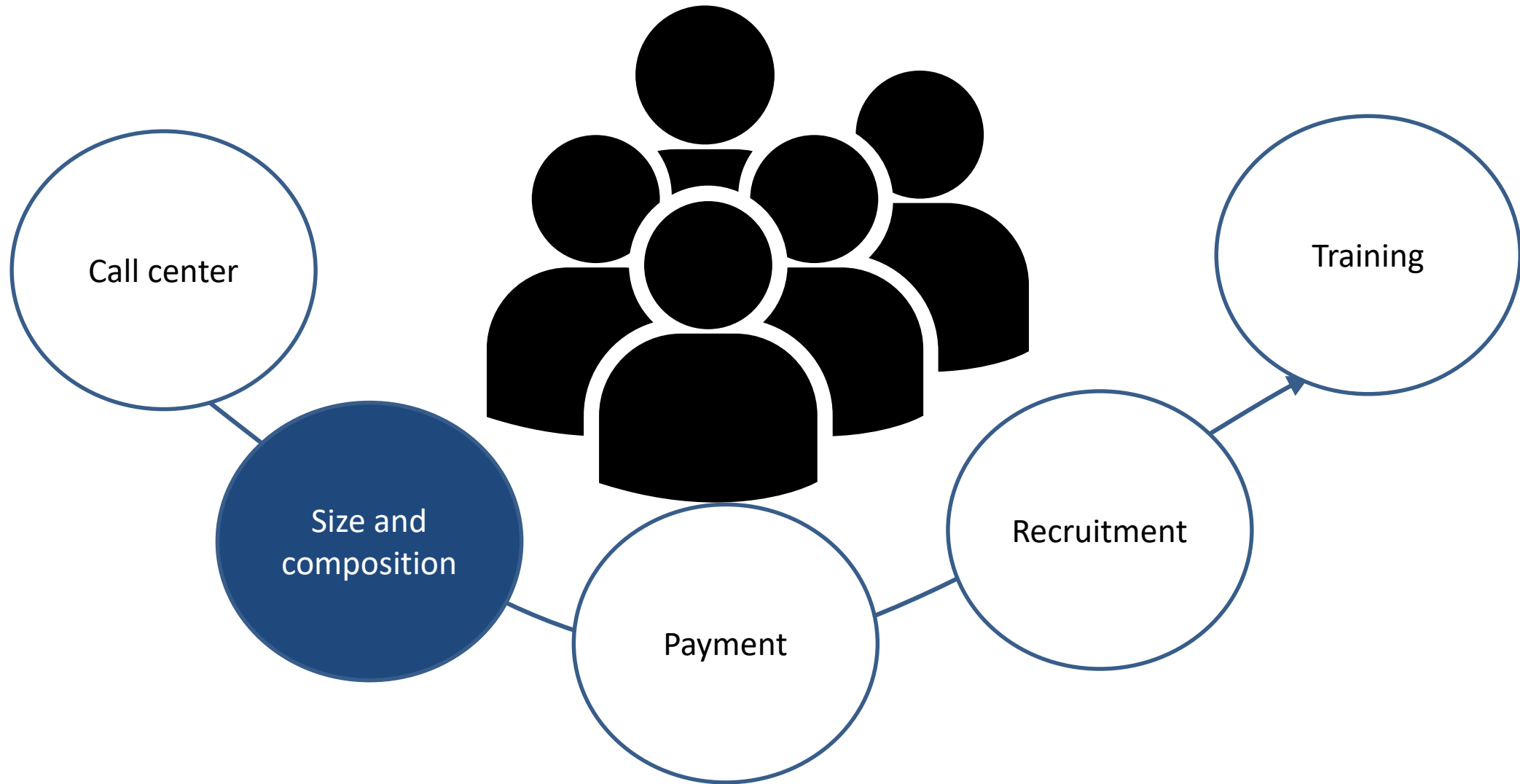
	In-House Team	Outsourced
Control over process	Higher ✓	Lower
Ability to safeguard data confidentiality	Higher ✓	Lower
In-house capacity building	Higher ✓	Lower
Efficiency over longer term	Higher ✓	Lower
Efficiency for single project	Lower	Higher ✓
Access to experienced interviewers	Lower	Higher ✓

Adapted from Dabalen et al. (2018)

Centralized vs. Decentralized Interviewing

- Determines whether interviewers conduct the survey from a central call center or outside the call center (e.g., in their homes)
- Relative evaluation of each approach

	Centralized	Decentralized
Ability to conduct centralized training	Higher ✓	Lower
Ease of monitoring and supervision	Higher ✓	Lower
Ability to transfer sample among interviewers	Higher ✓	Lower
Efficiency (no central call center is required)	Lower	Higher ✓
Flexibility of interviewer working hours	Lower	Higher ✓
Ease of <i>social distancing</i>	Lower	Higher ✓



Size of Interviewing Staff

- Can be estimated based on the following factors:
 - target number of completed interviews
 - average hours per completion
 - length of the data collection period in weeks
 - number of hours per week that each interviewer is expected to work

Example Calculations

- Total hours to complete the study
= (1500 interviews x 0.667 hour per completion) = 1000 hours
- Average interviewer hours per week
= (1000 total hours / 2 weeks) = 500 hours per week
- Number of interviewers required
= (500 hours per week / 25 hours per interviewer per week) = **20 interviewers**

Evidence from the Field

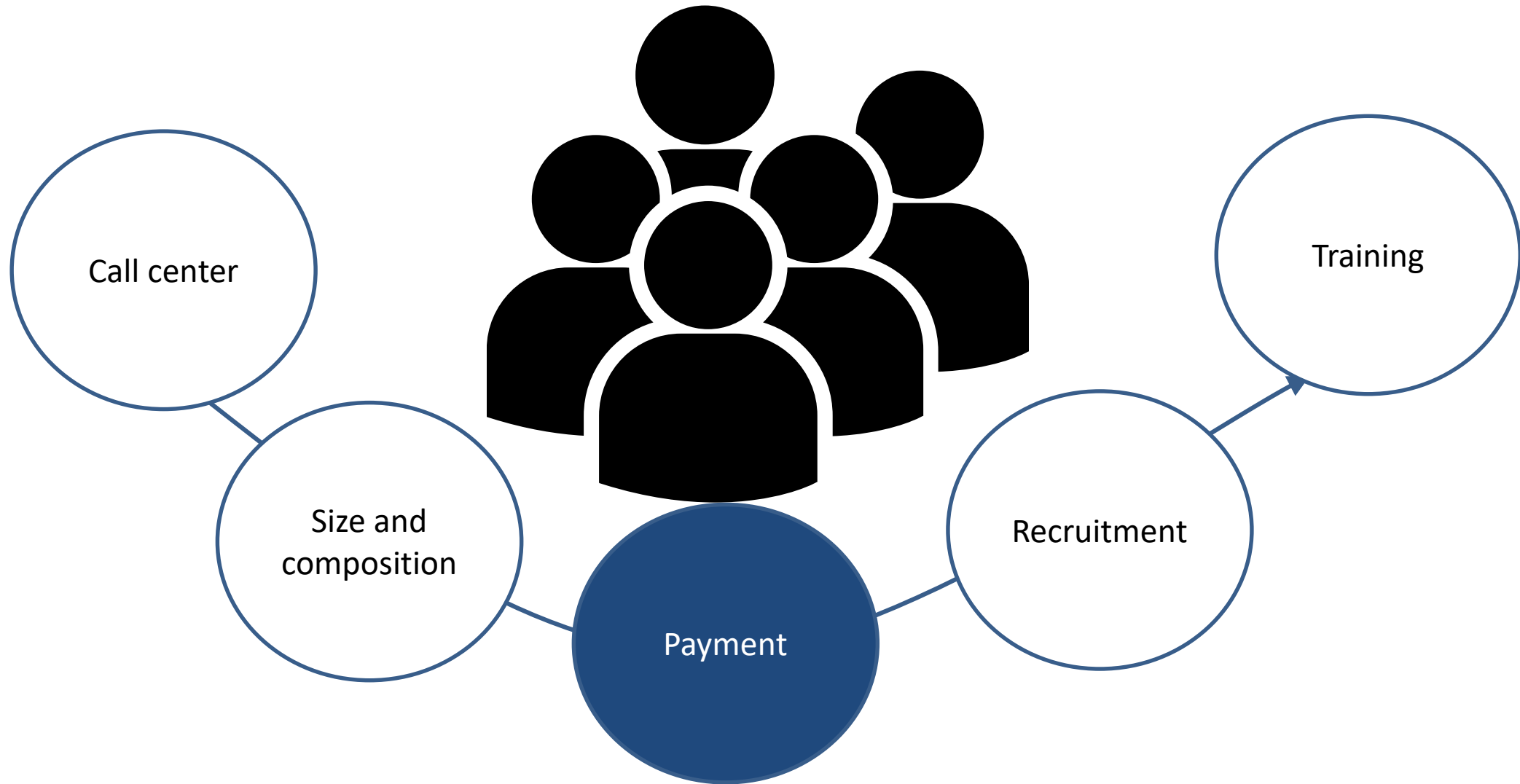
- ❑ Across mobile phone panel surveys in Africa (Madagascar, Malawi, Senegal, Tanzania, and Togo) that were two-weeks long, interviewers completed about 12 interviews of 15–20 minutes per day (Dabalen et al. 2018)

Composition of Interviewing Staff

- Relevant issues:
 - specialized skills or knowledge
 - language fluency
 - cultural norms
 - whether to match interviewer and respondents characteristics

Examples of Special Considerations

- In Nepal, it was observed that women preferred to speak to other women and men to men (Ghimire et al. 2013)
- In Zanzibar, it was observed that men objected to a women household member being interviewed by a man, and that men preferred to be interviewed by women (Dabalen et al. 2018)



Payment to Interviewing Staff

- Relevant issues:
 - the rate of pay for other jobs requiring similar skills
 - adjustments for regional cost of living standards
 - whether to pay a fixed fee, by the hour, or by the completed interview
 - whether to offer performance bonuses

Fixed Fee Payment

- A fee is provided for delivering interviewing services that does not vary (e.g., does not change depending on time it takes to conduct interviews)
 - Provides ability to anticipate interviewing costs
 - Quality monitoring and control mechanisms should be used

Hourly Pay Rate vs. Pay by Completed Interview

- Relative Evaluation of Each Payment Approach

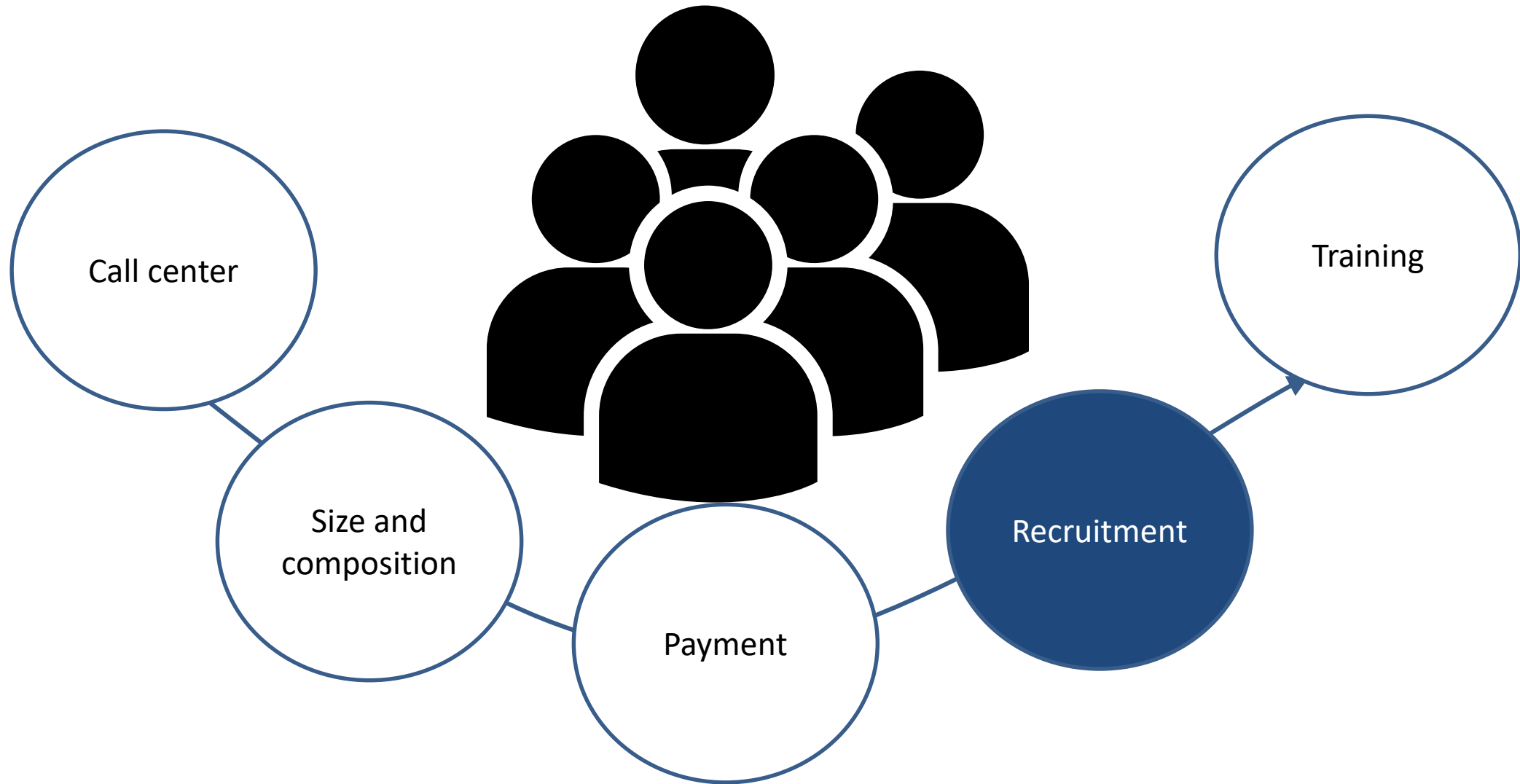
	Hourly Pay Rate	Pay by Completed Interview
Incentive to conduct careful interviews	Higher ✓	Lower
Incentive to focus on 'hard' cases	Higher ✓	Lower
Willingness to enter contact records	Higher ✓	Lower
Overall interviewer efficiency	Lower	Higher ✓
Incentive to persuade reluctant cases	Lower	Higher ✓
Ability to anticipate interviewing costs	Lower	Higher ✓

Adapted from Alcser et al. (2016)

Performance Bonuses

- Bonuses for high response rate
 - Example: 10% bonus for high contact rate or refusal conversion rate
 - May lead to similar drawbacks as paying by completed interview (increased incentive to rush through or even fabricate interviews)
- Bonuses for high-quality interviewing
 - Example: 10% bonus if interviewer makes few errors during interviews
 - May promote careful, conscientious interviewing
 - But requires robust interviewer monitoring system, including recording, auditing and reviewing interviews

Local research traditions and local labor laws may be relevant



Recruiting Interviewers

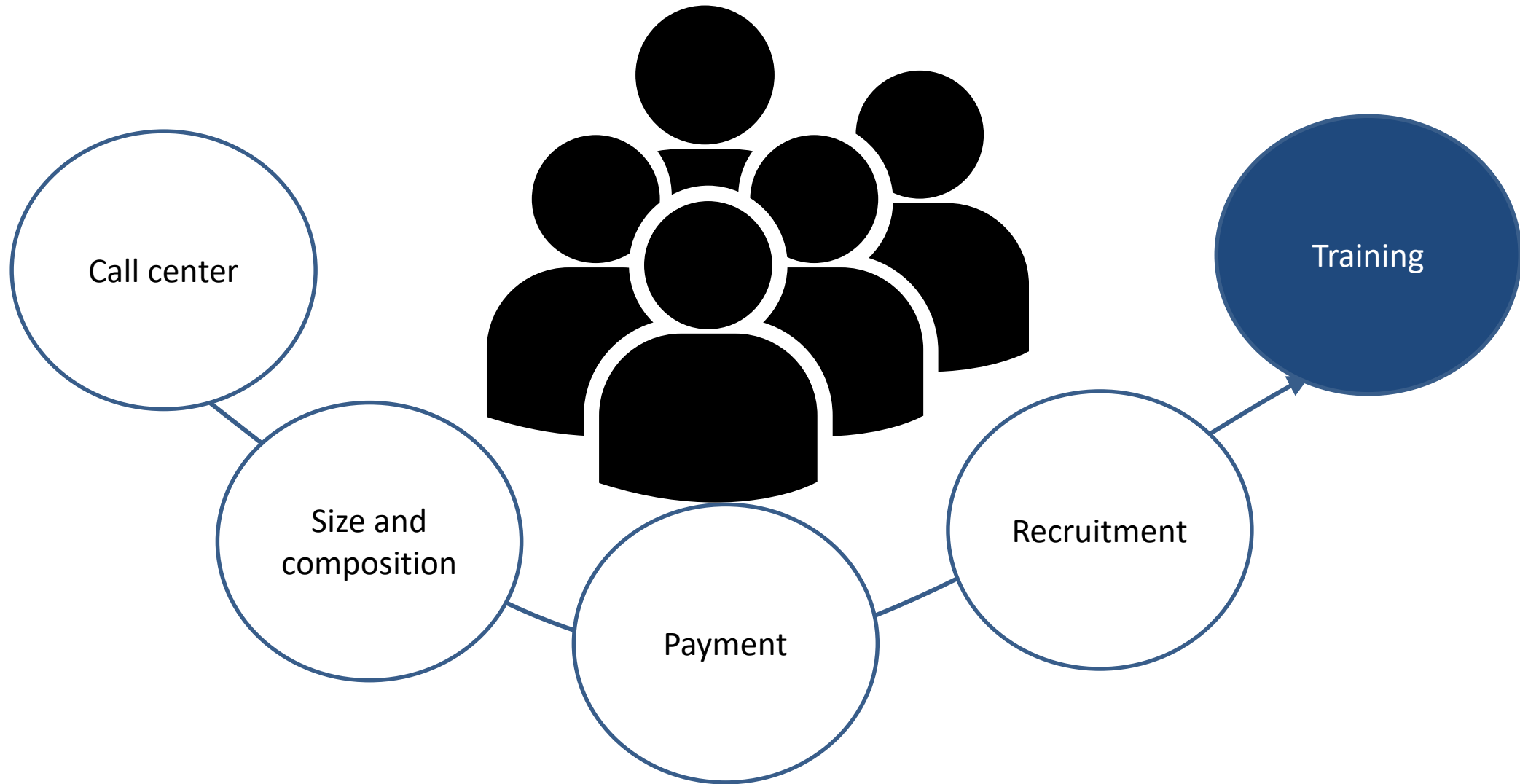
- Best practices
 - Consider interviewing applicants over the phone since it will be the mode they use for survey interviewing
 - If appropriate, conduct a criminal background check
 - Give the candidates a realistic preview of the job, schedule, and workload
 - Evaluate their skills and abilities objectively

Necessary Qualifications

- Location relative to call center (if using centralized call center)
- Reading and writing skills
- Conversation skills and phone manners
- Fluency in languages preferred by respondents
- Ability to work for duration of project
- Ability to work non-traditional hours
- Previous phone interviewing experience (*preferred*)

From the Field

- ❑ In the World Bank's Listening to Africa surveys, some call centers operate from 8:00 am to 8:00 pm and operate on both weekdays and weekends (Dabalen et al. 2018)



Interviewer Training

- Training period tends to be shorter for phone surveys than in-person surveys
- Laptops and/or tablets should be provided, if planning to use computer-assisted interviewing methods
- Interviewer manual should be provided

Online Training

- Online training is alternative to in-person training
- Basic requirements
 - Use of video conferencing software such as Zoom
 - Breakout rooms for practice sessions
 - Necessary equipment for interviewers (laptop computer and Internet/WiFi)
 - Training assessment submitted online or emailed to trainers
- If training is asynchronous (self-paced), then pre-recorded presentation videos are necessary

Interviewer Training: Suggested Topics

- Lectures and demonstrations by trainers
 - Respondent selection
 - Standardized interviewing; Interview protocol and etiquette
 - Special situations (low audio quality)
- Practice and feedback sessions
 - Mock interviews
- Training Assessment
 - Examples: written test; scripted certification interview with a supervisor

From the Literature

- Research from U.S. shows that interviewer training can promote the correct reading of questions, probing, and recording of answers (Fowler and Mangione, 1990)

Survey Pretest and Piloting

- After interviewers have been trained (or in parallel with this process), survey testing can be conducted
- Pretesting focuses on the questionnaire
- Piloting focuses on all aspect of data collection

Pretesting Methods

- Cognitive interviews: expanded interviews with potential respondents
 - think-aloud techniques
 - comprehension probes (concurrent or retrospective)
 - paraphrasing
- Expert review
- Formal respondent debriefings

Piloting

- Field test that should involve respondents from the target population, but outside the survey sample
- Goal is to identify any problems related with questionnaire, technology, data entry
 - Review response rates, response distributions, interview length, feedback from interviewers and respondents
- Use results to determine the best way to fix problems without introducing new ones
- If large changes are made, plan for another pilot

END OF VIDEO 1