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
Interviewing Staff: Decisions and Steps When Starting a Phone Survey

Call center

Size and composition

Payment

Recruitment

Training
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

<table>
<thead>
<tr>
<th></th>
<th>In-House Team</th>
<th>Outsourced</th>
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</thead>
<tbody>
<tr>
<td>Control over process</td>
<td>Higher ✓</td>
<td>Lower</td>
</tr>
<tr>
<td>Ability to safeguard data confidentiality</td>
<td>Higher ✓</td>
<td>Lower</td>
</tr>
<tr>
<td>In-house capacity building</td>
<td>Higher ✓</td>
<td>Lower</td>
</tr>
<tr>
<td>Efficiency over longer term</td>
<td>Higher ✓</td>
<td>Lower</td>
</tr>
<tr>
<td>Efficiency for single project</td>
<td>Lower</td>
<td>Higher ✓</td>
</tr>
<tr>
<td>Access to experienced interviewers</td>
<td>Lower</td>
<td>Higher ✓</td>
</tr>
</tbody>
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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

<table>
<thead>
<tr>
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<th>Centralized</th>
<th>Decentralized</th>
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<tbody>
<tr>
<td>Ability to conduct centralized training</td>
<td>Higher ✓</td>
<td>Lower</td>
</tr>
<tr>
<td>Ease of monitoring and supervision</td>
<td>Higher ✓</td>
<td>Lower</td>
</tr>
<tr>
<td>Ability to transfer sample among interviewers</td>
<td>Higher ✓</td>
<td>Lower</td>
</tr>
<tr>
<td>Efficiency (no central call center is required)</td>
<td>Lower</td>
<td>Higher ✓</td>
</tr>
<tr>
<td>Flexibility of interviewer working hours</td>
<td>Lower</td>
<td>Higher ✓</td>
</tr>
<tr>
<td>Ease of <em>social distancing</em></td>
<td>Lower</td>
<td>Higher ✓</td>
</tr>
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Adapted from Alcser et al. (2016)
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
  \[= (1500 \text{ interviews} \times 0.667 \text{ hour per completion}) = 1000 \text{ hours}\]
- Average interviewer hours per week
  \[= (1000 \text{ total hours} / 2 \text{ weeks}) = 500 \text{ hours per week}\]
- Number of interviewers required
  \[= (500 \text{ hours per week} / 25 \text{ hours per interviewer per week}) = 20 \text{ interviewers}\]

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)
Call center

Size and composition

Payment

Recruitment

Training
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

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<tr>
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<th>Hourly Pay Rate</th>
<th>Pay by Completed Interview</th>
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</thead>
<tbody>
<tr>
<td>Incentive to conduct careful interviews</td>
<td>Higher ✓</td>
<td>Lower</td>
</tr>
<tr>
<td>Incentive to focus on ‘hard’ cases</td>
<td>Higher ✓</td>
<td>Lower</td>
</tr>
<tr>
<td>Willingness to enter contact records</td>
<td>Higher ✓</td>
<td>Lower</td>
</tr>
<tr>
<td>Overall interviewer efficiency</td>
<td>Lower</td>
<td>Higher ✓</td>
</tr>
<tr>
<td>Incentive to persuade reluctant cases</td>
<td>Lower</td>
<td>Higher ✓</td>
</tr>
<tr>
<td>Ability to anticipate interviewing costs</td>
<td>Lower</td>
<td>Higher ✓</td>
</tr>
</tbody>
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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