

# Qualitative Innovations Implemented During ASEC Testing

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# Two Innovations

- Question Template  
for the questionnaire design process
- MicroTesting  
to supplement the qualitative testing plan

# Question Template: A Helpful Communication Tool for Team Questionnaire Design

# Background

- Annual Social and Economic Supplement (ASEC) of the Current Population Survey (CPS) “modernization”
  - Introduce web-based instrument for self-administration
- Large redesign
  - 30+ SMEs, 4 years, multiple stages of qualitative testing
  - Conducting quantitative testing on Census panels
  - 1 methodologist
- SMEs were the authority on the redesign
  - First draft of new questions
  - Not methodologists

# How to make this work?

Need to

- Understand the SMEs' goals for each question
- Provide feedback and encourage good questionnaire design
- Develop an effective protocol (probes) to get the info we need to make decisions
- Keep a record of changes/versions

# Question Template

1. Research Question (Motivation)
2. Universe
3. Question Text (with response options, instructions, and fills)
4. Report back

# Question Template Example

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**Research Question:** Concerned that hours worked instruction is being ignored and people are reporting their “favorite” employer or the job they went to school for instead. Particularly worried about those working in the gig economy.

**Universe:** Q6 Working = Yes (1)

**Q7:** What is the name of your MAIN job?

*If you have more than one job, answer for the job in which you work the most hours.*

Name of MAIN job: \_\_\_\_\_

**Report:** Are respondents reading the instruction? Whether they read it or not, are they naming the job where they work the most hours?

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# How the SMEs used the Template

## Question 2a

<b>Motivation:</b> HIGH PRIORITY. This is a new question restricted to the “Private health insurance” responses for Q2. Need to test response options.		
	Details	Notes
<b>UNIVERSE</b>	Q2 = 1	
<b>QUESTION TEXT</b>	How did you get your private health insurance? <i>Select all that apply</i>	
<b>FILLS</b>	Response #8 below should be the state-specific name of the healthcare.gov portal in the respondent’s state.	
<b>PERSON- OR HOUSEHOLD-LEVEL</b>	Person	
<b>QUESTION TYPE</b>	Checkbox	
<b>ANSWER LIST</b>	Current job (yours or another family member) – 1 Former job (yours or another family member) – 2 Union or professional association – 3 Directly from an insurance company – 4 Broker – 5 State or Federal Marketplace – 6 Healthcare.gov – 7 [^State-Specific Portal Name] – 8	
<b>SKIP INSTRUCTIONS</b>	(Q2a = 1 – 8 or Skipped) AND (Q2 NE 7 or 8) ➔ Go to Q11 (Q2a = 1 – 8 or Skipped) AND (Q2 = 7 or 8) ➔ Go to Q4	
<b>NON-SCREEN ITEM</b>	NA	
<b>Report back:</b> Does the response “Directly from an insurance company” make sense? Does the overlap in “State or Federal Marketplace,” “Healthcare.gov,” and/or the state-specific portal name confuse people?		



# Outcomes

- Met the goals outlined earlier (version control, develop protocols)
- Provided structure to a daunting task
- Facilitated communication
- Easy to understand and implement

## Other Benefits

- Used as programming spec
- Templates defined the format of the contractor's report
- SMEs' basic questionnaire design skills improved

# Conclusion: Question Template

Whether working with methodologists or non-methodologists, the template is beneficial for any team questionnaire design.

Sinibaldi, Jennifer, and Jessica Holzberg. 2025. “A Question Template for Non-Methodologists When Redesigning a Questionnaire.” *Survey Practice*. <https://doi.org/10.29115/SP-2025-0010>.

# MicroTesting: Quick and Focused Qualitative Testing

# Background

- ASEC redesign involves lengthy and extensive qualitative testing, done through a contract

## ASEC Stages:

- Exploratory interviews
  - Rounds 1 and 2 of Cognitive Interviewing
  - Usability
  - Field test
- Pressure to make significant progress at each stage
  - Hard to introduce additional testing

# How can we introduce some flexibility?

- Testing method that
  - Provides a nimble approach to address problems quickly, without having to wait for the next large round of testing
  - Takes the pressure off having to solve every problem within a couple rounds of cognitive testing
  - Allows for A/B testing when trying to decide between two questions
  - Gives the methodologist a tool to make a justified recommendation when literature isn't available

# What is MicroTesting?

Mini qualitative test(s), usually cognitive interviewing

Each test:

- Small sample (6-10 people)
- Short instrument
- Focused
  - Specific problem
  - Targeted respondent attributes
- Test should take 10-20 minutes

# More Detail about MicroTesting

- OMB approval secured as part of larger testing package
- All parts of the test conducted in-house
  - Designing protocol and respondent materials
  - Programming and testing web survey for respondent
  - Recruitment
  - Interviewing
- Can offer a small digital incentive

# Variations on MicroTesting

- Methodology is adaptable, depending on the problem being addressed
  - Conduct one test for one section of the survey
  - Conduct several tests, each on different sections of the survey
  - Testing on a single section is iterative, processing results and then fielding again
- Timing is flexible: Done between other testing rounds or concurrently
  - Between rounds - helps to refine before next large round of testing
  - Concurrent - done for subgroups not targeted in large tests



# Examples of MicroTesting

1. Exploratory interviews found that people don't understand "health insurance", "health plan", or "health coverage". Since a term must be chosen for cognitive testing and the decision impacts many questions in the health insurance instrument, MicroTesting can be done to focus on this terminology.
2. Team has several ideas for how to format questions asking for income amounts, including a couple grid formats. A usability MicroTest could be conducted on a small sample of people to help focus the question format before cognitive testing begins.

# ASEC Applications

- To prepare for Round 2 Cognitive Testing
- Health Insurance
  - 8 interviews over 2 weeks
- Childcare
  - 5 interviews over 2 days (disrupted by return to office)
- Recruited both from sample of prior respondents
- Mini-report

# How it Went

- Very successful!

From the Health Insurance SME on the project:

“I liked MicroTesting because it gave us a chance to probe respondents while the questions being tested were still fresh in their minds. You can dive right in where it counts the most. And because it was a short instrument, focused on a few questions, respondents were very engaged. We made really important progress on our instrument using this method. I'm a fan of MicroTesting!”

# Summary

- MicroTesting is a short qualitative test, designed to help researchers focus on subsets of the instrument and get results more quickly
- Allows for additional insights and tweaks during a lengthy questionnaire development project
- Functions like a larger cognitive test
- Meant to supplement, not replace, larger cognitive tests
- Seems to be a promising technique!

# Thank you

Feel free to talk to me if you have questions about the  
Question Template or MicroTesting

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# MicroTesting vs. Hallway testing

- Very similar
- Hallway testing can often be “emergency” testing
- MicroTesting is more deliberate
  - OMB approval, more than 9 cases across rounds
  - Intentional part of qualitative testing design
  - Recruitment quotas