CARI Monitoring: Issues and Responses

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Objective of Presentation:

- To explore the perceived benefits and challenges of employing a standardized CARI (Computer Assisted Recorded Interviewing) monitoring system and process across both telephone and field projects

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Why deploy CARI monitoring for telephone studies?

- Increase efficiency of call center monitoring operations
- Allow recordings to be archived and reviewed by multiple people as necessary
- Allow database storage of feedback forms
- Increase quality of reports

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Standardized CARI monitoring across telephone and field studies:

- Why are we looking at standardizing CARI monitoring across telephone and field studies at RTI?

    - Ease of project start-up
    - Consistent performance metrics and evaluation criteria
    - Uniform monitoring methodologies for projects that implement a multi-mode design
    - Expanded data to evaluate trends over time and inform interviewer training

Issues Considered:

- Evaluation Criteria & Process
- Feedback Process
- Session Monitoring Sampling Options
- Recording of Interviews
- Reporting Options
- Systems Development
- Management of Recorded Files

Evaluation Criteria and Process

- Develop a design:

  - Consider all evaluation criteria currently used in assessing interviewer performance for field and telephone projects at RTI
  - Identify common evaluation items
  - Identify similar items which can be combined
  - Select items to represent the standard across phone and field projects
  - Identify items which allow for evaluation of interview authenticity vs. quality of interviewer performance

Evaluation Criteria and Process (cont.)

- Determine where variations would be necessary between projects and how this could be implemented

- Examine processes to ensure inter-monitor reliability

Evaluation Criteria and Process (cont.)

- Skill Areas that should be monitored :
    - Case Management
    - Initial Contact
    - Keying
    - Reading
    - Probing
    - Feedback
    - Presentation
    - Professional Behavior
    - Interview Protocol

- Other Ranking Areas
    - Authenticity
    - Technical Issues

Evaluation Criteria and Process (cont.)

- Possible variations in evaluation criteria:
  - "Exceptional" behavior items
  - Telephone vs. Field requirements
  - Conversational interviewing
  - N/A options (example: authenticity only)
  - Other (specify) options

- Processes to ensure inter-monitor reliability
  - Training of monitors
  - Tallying of observed behaviors and automatic scoring

Feedback Process

- Mechanism for providing feedback to the interviewer
  - Format of feedback
  - Method of transmission
  - Delivery of feedback to interviewer

- Feedback at the case level / file level / interviewer level?
  - Different for telephone and field?

- Timeliness of feedback

Considerations for Sampling Monitoring Sessions

- Sampling of the sessions
  - First "n" interviews for each interviewer
  - Percentage of each interviewer's work
  - Percentage of overall work on the project

- Sampling of files within a case to review
  - Automated selection vs. manual selection
  - Time-based vs. section-based
  - Combinations

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Challenges in Standardizing Sampling Methods across Telephone and Field

- Current RTI Method for telephone studies

  – Portion of hours worked by interviewer on project
  – Time based monitoring session
  – "Hit or miss" with portions captured

Challenges in Standardizing Sampling Methods across Telephone and Field

- **Challenges going forward**
  - Call center sampling needs differ from field
    - Field: monitoring of completed interview only
    - Call center: completed interviews; refusals; initial contact information; pending cases
  - Multiple interviewers working a single case
  - Handling pending, partial and completed interviews

Recording of Interviews

- Considerations for recording
  - Amount to record
  - Initiation of recordings
  - Time constraints vs. Section / Item constraints

- Tailoring the approach for projects
  - Some projects may require a higher level of monitoring than others

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Reporting Options

- Individual feedback summaries
  - Storage issues
  - Access issues

- Project reports
  - Types of data for interviewer-level reports
  - Reports at the question and file recording level

- Additional options
  - Project level trend reports (not defined by interviewer)
  - Project specific data vs. cross-project data (interviewer level)

Systems Development

- Usability and functionality of system

- Control access issues

- Support of sampling rates and constraints
  - Ability to increase at the project and interviewer levels

- Production of feedback report

- Creation of database for session evaluations

Management of Recorded Files

- Linking audio files to interview outcomes (i.e., to identify completed interview files vs. others)

- Process for labeling and storing audio files

- Control access issues

- Plans for archiving audio files

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A Few Topics for Discussion:

- Telephone studies – multiple interviewers working different parts of the same case
  - Should this be a sub-sampling issue?
  - Should there be a mechanism to provide multiple reviews, at the interviewer level, of the same case?

- Identification of reviewers
  - Should a core group trained on CARI reviews be employed?
  - Should individual projects conduct their own reviews?

- Determination of monitoring rates for veteran vs. new interviewers

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What do you think?

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