Data Quality through the Lens of Field Staff: Identifying Data Problems and Improving Data Quality in the Survey of Consumer Finances

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Survey of Consumer Finances (SCF) delves into every financial detail of a household’s finances

Maximizing data quality is a constant challenge

Feedback is important

- Emphasize the quality of field interviewer’s work
- Enhance feedback loops over time
- Especially critical for new interviewer staff.
Improve **data quality** on the SCF

**Unique challenges**
- Collection of highly sensitive data
- Need for precise numeric data

High quality data as part of **interviewer performance**

**Tools designed to enhance interviewer performance**
- Knowledge-building through training
- Expertise earned through proper CAPI administration
- Productivity gained through adherence to protocols
NORC and FRB DATA REVIEW PROCESS

Contextual Data:
- Call records
- Comments recorded during the interview
- Post-interview debriefing notes

Data Measures:
- # Missing values
- # Range responses as opposed to precise numbers

Other Error:
- Interviews conducted with wrong respondent
- Critical Missing Data

Substantive Data:
- Comprehensive case level review and editing following weekly data deliveries

NORC + Data Measures + Other Error = NORC

FRB
SCF DATA QUALITY PROCESS ENHANCEMENTS

- CAPI Questionnaire
- Data Collection Protocols
- Interviewer Training
- Data Collection Quality Assurance Monitoring
- Data Processing and Editing
Feedback is critical to informing improvements:

- Clarified survey content management
- Effective respondent engagement
- Efficient administration of data collection protocols
- Enhanced data precision
Limitations of existing feedback loops:

• Often limited to a specific case or interviewer

• Challenging to apply lessons more broadly

• Loss of saliency due to time elapsed between field event and feedback provided

• Retrospective rather than prospective
Modeling the Role of Interviewer Feedback in Survey Data Lifecycle

Look to **expand the engagement** of interviewers to:

- Actively identify field challenges and obstacles
- Expedite access to critical support tools

Track the usage of training and reinforcement activities

- **Timeliness**
- **Effectiveness**
Two aspects of the data quality/improvement process

- Will involving **interviewer self-assessment** and correction result in improved performance over time?

- Will the additional features of the data quality program result in timely feedback that can result in **measureable performance improvement**?
OBJECTIVES OF FEEDBACK REFINEMENTS

Data Quality and Performance Improvement

Utilize interviewer perceptions to inform data quality monitoring process

Accelerate process for identifying collection challenges and potential error in the field

Motivate interviewer staff to actively participate in the enhancement of data quality
MOTIVATING INTERVIEWER PERFORMANCE

Increase awareness

- Present common issues and solutions ➔ optimize saliency and recognition

Promote accountability

- Self-report ➔ enhance interviewer analysis and problem solving

- Prioritize interviewer engagement with project support team
Recognize autonomy

- Promote skill enhancement and growth
- Minimize punitive nature of feedback

Seek achievement and mastery

- Interviewing as an art form, not just a mechanical operation
Weekly interviewer **performance questionnaire**

Weekly **newsletter** designed to emphasize two tiers

**Tailored interventions** → improve performance
- Reviewing protocols defined in online manuals
- Viewing training videos
- Completion of online coursework
- Participation in group calls with other field staff
- One-on-one interventions with field manager
TAILORED INTERVENTIONS

Individually and Collectively Responsive

Tailored to the **individual**

Respond to **specific areas for improvement**

- Use objective observations to recommend and prescribe interventions
- Focus on timely interventions specified to interviewer’s experience
Prospective engagement in terms of quality improvement reminders from across the national field effort

- Distributed to the entire field team based on current observations
- Focuses on recurring and trending issues
- Reinforcement of critical data quality protocols
NEXT STEPS

Implement interactive feedback cycle

- Accelerate timeliness of shared feedback

- Provide scripted weekly feedback aligning with current data collection activity

- Review interviewer feedback captured and monitor prescribed training/reinforcement
Track interviewer performance

• Add as a separate measure of successful interviewer performance

• Look at number of specific interventions prescribed and overall change in the quality of data collected in future questionnaire administration
Maximizing data quality is a constant challenge

Field interviewers are integral part of data collection and data quality

Increased, positive focus on interviewers will enhance data quality
Thank You!

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