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**Summary of Observers' Reports from the Re-Engineered
Survey of Income and Program Participation Event
History Calendar Field Test**

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I. Introduction

A. Overview

In April through June of 2008, a paper-and-pencil “event history calendar” (EHC) field test was conducted in two sites, Illinois and Texas. The test’s primary objective was to determine whether a Survey of Income and Program Participation (SIPP) interview conducted via EHC methods, and administered once per year, could produce data of equal (or better) quality compared to the data collected using a conventional “standardized” questionnaire administered every four months, as is SIPP’s current practice. The prototype instrument contained a small subset of SIPP content, focusing on need-based government transfer programs such as Food Stamps. Interviewers completed 1,627 in-person household interviews for a unit-level response rate of approximately 91%. The evaluation of the field test will focus mainly on a comparison of the data derived from the EHC and SIPP questionnaires collected from the same people and for the same time period, but will also include respondent and interviewer (“Field Representative”) debriefings, and interview observation reports. Ideally, the evaluation would have also included recordings of the interviews for later analysis such as behavior coding, but heightened data security concerns precluded making such recordings. Thus, the observations were arranged in order to gain some understanding of the interviewer-respondent interaction from an outside perspective. This report presents findings from the observations; separate reports will be prepared for each of the other evaluation methods.

B. SIPP Basics

SIPP is a nationally-representative, interviewer-administered, longitudinal survey conducted by the U.S. Census Bureau. Inaugurated in 1984, the survey provides data on income, wealth, and

¹ This paper is released to inform interested parties of research and to encourage discussion. The views expressed are the author’s, and not necessarily those of the U.S. Census Bureau. This paper is largely the result of work carried out by Ms. Miller, a Master’s degree candidate in the Survey Research and Methodology program at the University of Nebraska-Lincoln, during an internship at the Census Bureau in the summer of 2008; Joanne Pascale and Jeffrey Moore contributed editorial assistance to the preparation of the final version.

poverty in the United States, the dynamics of program participation, and the effects of government programs. In its current design, each SIPP panel consists of multiple waves (or rounds) of interviewing, with waves administered three times a year, at four month intervals. The SIPP sample is split into four equivalent subsamples, called “rotation groups”; each rotation group’s interview schedule is staggered by one month, in order to maintain a constant workload for field staff. Starting with the 1996 panel, all SIPP interviews are now conducted with a computer-assisted questionnaire; the first interview is administered in-person, subsequent interviews are generally conducted via telephone. The SIPP core instrument, which contains the survey content that is repeated in every survey wave, is detailed, long, and complex, collecting information about household structure, labor force participation, income sources and amounts, educational attainment, school enrollment, and health insurance over the prior four-month period. A typical SIPP interview takes about 30 minutes per interviewed adult. See U.S. Census Bureau (2001a) for a more complete description of the current SIPP program.

Starting in 2006, the Census Bureau initiated an effort to re-engineer the SIPP to accomplish several goals, including reduced burden on respondents, reduced program costs, improved data timeliness and accessibility, and improved relevance, all without inflicting harm on data quality. A key component of the re-engineered survey is a proposed shift away from its traditional every-four-month data collection schedule, with each interview covering the preceding four calendar months, to a single annual interview covering the preceding calendar year. Such a change would yield several key benefits almost immediately – for example, field costs would be substantially reduced, and the SIPP data structure, freed from its traditional staggered rotation group design, would be greatly simplified. To maintain data quality while accomplishing this shift, the Census Bureau proposes to employ event history calendar (EHC) methods to gather SIPP data (Fields and Callegaro, 2007). More information about the re-engineering effort and its schedule is available on the SIPP website at: <http://www.sipp.census.gov/sipp/dews.html>.

C. Event History Calendar Methods

EHC interviewing has been employed since the 1960’s to assist interviewers in collecting detailed data across long recall periods (Belli, 1998; Belli, Shay, and Stafford, 2001; Callegaro 2007). The method works by supporting and encouraging recall of information in a more natural and “autobiographical” manner, and in a manner which exploits the naturally-occurring links and associations among memory elements. Belli (1998) provides a strong theoretical rationale for the use of EHC methods, and their likely superiority to more traditional survey instruments using a standard, scripted, question-by-question (Q-by-Q) approach.

Although most research which has evaluated the EHC approach finds results which are consistent with the hypothesis of improved data quality, exceptions are not unknown – including exceptions for topic areas of key importance to SIPP, such as the reporting of receipt of need-based program benefits. In addition, the research base is limited in terms of studies having a direct bearing on the main SIPP design issue – the proposed shift from a reference period which covers the four preceding calendar months to one which covers the preceding calendar year. Almost exclusively, published studies comparing the Q-by-Q and EHC interview treatments have used survey recall periods much longer than SIPP’s – none less than a year, and some covering multiple years.

The EHC field test, which is the subject of the present study, was primarily motivated by these concerns – about the data quality implications of the switch to EHC methods for the topics of most interest to SIPP, as well as the switch from a four-month recall period to a one-year recall period. See Fields and Moore (2007) for a detailed description of the goals and design of the field test.

II. Observation Methods

As noted above, EHC field test observations were primarily intended to provide important information about EHC interview processes that could not be derived from the survey data themselves. Altogether, 21 observers were recruited from a number of Census Bureau divisions; a staff member from the Office of Management and Budget also served as an observer. Most members of the inter-divisional Re-Engineered SIPP Research Group participated, as did other staff with subject-matter expertise, staff responsible for SIPP data processing, instrument authors, and staff from other areas. A one-hour briefing for observers was held prior to departure, covering the purpose of the field test and observations, and the procedures for conducting the observations (see Appendix A).

In order to provide structure to the observations, a short form was developed for observers to fill out after each EHC interview. The 4-page form (see Appendix B) contained 14 standardized questions, along with several open-ended “please describe” follow-up questions. The content covered the Field Representative’s (FR’s) use of landmarks and events from other domains within the calendar to assist recall, the FR’s general facility with the interview, respondents’ engagement with the interview, and the adequacy of training. Observers were asked to observe the interview as unobtrusively as possible, to take free-form notes on anything of interest, and then to fill out the form after leaving the respondent’s home. Both the forms and the free-form notes – and any general summary the observer cared to provide – serve as the data for this analysis.

Observations in each site were arranged through the coordinating Regional Office (Chicago or Dallas), and their scheduling was dictated solely by pragmatic, rather than scientific, considerations. Observations were scheduled early in the data collection period, to maximize the observers’ chances of actually seeing live interviews; they were also scheduled to avoid disrupting the typical routine of the field staff as much as possible; and no attempt was made to systematically sample interviewers or the cases in their assignments, or to otherwise control the observers’ work. Over the course of the field test, the 21 observers accompanied 20 different FRs to 75 field test households, where they observed 145 individual EHC interviews. Observations were split fairly evenly between the two sites; 76 from Illinois and 69 from Texas. The range of the number of EHC interviews observed by each observer was large, from a low of 1 to a high of 19. About 60% of the observed EHC interviews were conducted by self-response, and the remaining 40% used a proxy respondent. Depending on the timing of the observer’s visit, the FRs who conducted the interviews also ranged widely in their experience with the EHC instrument. The observation form included a space for recording the approximate number of EHC interviews the FR had conducted; among the 117 forms for which this information was provided, the average experience across FRs was just under 12 EHC person-level interviews.

III. Results – “Observation Report” Form

This section summarizes results from the standardized “Observation Report” forms, organized by general categories of items. Due to occasional nonresponse, but mostly due to the form’s “skip” instructions, not all observers answered all questions. Missing data (and DK nonresponses) are ignored. The denominator for each of the response estimates cited here is the number of cases in which an answer was provided; the total number of reports for each response option is shown in parentheses.

A. Use of Landmarks and Domain Events to Assist Recall (items 1, 2, 3a, 3b, 3c, 4)

Responses to the initial set of Observation Report items suggest a solid (if unspectacular) level of use of signature EHC techniques by field test FRs – appropriate, it seems, to the demands of the situations presented by respondents, with only rare missed opportunities. About 40% of observed interviews yielded at least one instance (and generally only one or two) of an FR using a landmark event or an event from another domain to assist respondent recall. These actions on the part of the FR were seen as generally helpful to the respondent, and there were no reports of their being inappropriately applied. Below is an item-by-item summary of observers’ reports.

1. In the EHC interview for this person, did you observe the FR try to help the respondent recall the date of an event by reminding him/her of a LANDMARK EVENT?

- Yes 31% (45)
- No 69% (100)

Observers reported that the FR referred to a landmark event in almost one-third of the observed interviews. The “yes” responders were asked to “Please describe what happened.” The resulting comments describe some instances of FRs’ use of landmarks that were tied to the issue at hand only sequentially, but that were sufficiently salient to the respondent to help with recall. For example, one FR referred to Christmas and a trip to Asia to help a respondent remember when her son was looking for work; another used the birthday of the respondent’s granddaughter throughout the interview to help date events. In other cases the nature of the landmark event was clearly tied to the event being asked about – for example, a hospital stay was used to help date taking time off from work, and a job loss was used to date health insurance coverage. In a few cases not enough detail was noted to determine how the landmark and target event were related (e.g., seasons were used to date the timing of jobs).

2. In the EHC interview for this person, did you observe the FR try to help the respondent recall the date of an event by reminding him/her of AN EVENT FROM ANOTHER EHC DOMAIN?

- Yes 20% (29)
- No 80% (113)

According to observers’ reports, use of an event from another domain as a recall aid was less common than use of a landmark event, but still occurred in 20% of observed interviews. The most common domain called upon for this purpose was employment. For example, several FRs

referred to job changes (through retirement, changing jobs, getting fired, etc.) to assist respondents in dating changes in their health insurance coverage; FRs also used work status in general to determine the presence/absence of health insurance. Job status was also used to date unpaid labor in a family business, a gap in employment was used in the section on looking for work, and hours worked were used to date summer school closing.

Other domains were also noted, though less frequently. One FR used school enrollment to help determine employment dates, and disability/retirement income was used to probe for dates of pension and social security receipt. Age (not technically a domain from the calendar but nonetheless recorded by observers here) was used to verify health insurance and Social Security coverage. Another FR used assets to assist in the collection of the respondent's total Social Security benefit amount.

3a. How many times did you observe the FR offer this sort of help?

- Once 51% (26)
- Twice 25% (13)
- 3 times 16% (8)
- 4 times 4% (2)
- 5 or more times 4% (2)

Observers reported 57 separate cases (39% of all observed interviews) in which the FR cross-referenced either a landmark event or an event from another domain, or both, to assist recall. According to those who responded to item 3a, FRs who employed this key feature of the EHC method did so somewhat sparingly – about half brought up a landmark event or an event from another domain only once during the course of the observed interview, one-quarter did so twice, and another one-quarter did so three or more times.

3b. In general, did the introduction of the landmark/prior domain event seem to help the respondent recall a date of interest?

- Helped a lot 38% (20)
- 17% (9)
- 13% (7)
- 13% (7)
- No help at all 19% (10)

Over half of those who observed FRs offer this sort of assistance reported that respondents seemed to be “helped a lot” (or the unlabelled next-most-positive scale position) by it. On the other hand, about one-third were under the impression that the attempted assistance was “no help at all” (or the next higher scale position). Assigning numerical values to the scale points of 1 (“No help at all”) through 5 (“Helped a lot”), yields an average rating of 3.4 among the 53 responding observers – slightly above the scale mid-point.

In their “Please describe...” comments, observers noted both types of situations described above – that is, those in which the landmark or domain event seemed to be tied to the event being asked about only through their sequential order, and those in which the relationship was clearly substantive. Examples of the former include the following: a daughter's birthday was used to

date employment spells, a family vacation was used to date school enrollment, and a death in the family helped determine that the respondent had not worked in the previous year. In another case a landmark event helped reveal that an event of interest was in fact out of scope, since it had occurred prior to 2007. Examples where the association was more than merely sequential included the use of employment data to gather health insurance information, and the use of disability information to date Social Security receipt, retirement, and Medicare coverage.

3c. Did the FR ever try to introduce a landmark/prior domain event in a situation where you questioned whether it was appropriate to do so, or in a manner that seemed inappropriate to you?

- Yes 0% (0)
- No 100% (55)

Observers reported that they witnessed no cases of the inappropriate use of landmark events or prior domain events to assist recall – no observer responded “yes” to item 3c.²

4. In the EHC interview for this person, did you observe the FR MISS AN OPPORTUNITY to bring up a landmark/prior domain event to help the respondent recall some date?

- Yes 7% (10)
- No 93% (132)

Observers reported very few instances in which they felt an FR missed an opportunity to use a landmark or another domain event to assist respondent recall.³ Among the missed opportunities noted by observers were the following:

- a respondent received no assistance from the FR despite displaying obvious trouble in reporting when, exactly, a new job started;
- a respondent reported doing odd jobs during the summer, for which the FR recorded a spell of work from June through August without any probing for details (at the completion of the interview the observer probed the respondent, at which point the respondent used multiple landmarks to help recall the precise timing of the odd jobs);
- an FR failed to verify a respondent’s uninsured status by cross-referencing with his dates of employment;
- an FR missed an opportunity to refer to a big family vacation to clarify whether a respondent’s work hours changed, and similarly for a subsequent proxy interview;
- a proxy respondent reported that a spouse had been temporarily laid off from November 2007 through April 2008, as occurred most years; the FR failed to probe for a layoff earlier in 2007.

² Section IV.A. of this report, which summarizes observers’ other comments, presents some conflicting evidence on this point. These comments mention some questionable use of landmark events – specifically, situations in which FRs brought landmarks into the interview interaction even though the respondent gave no evidence of needing any assistance.

³ This is probably a conservative estimate of the true extent of missed opportunities. Non-events are by their nature difficult to detect. In addition, the observers were not, for the most part, highly trained or experienced in assessing survey interactions, and most were quite new (at best) to EHC methods in particular.

B. FRs' General Handling of EHC Interview; Adequacy of Training (items 5, 6a, 6b, 7)

This set of items paints a very consistent picture – observers judged FRs to have been very well prepared to conduct the field test interviews, and in general to have done so smoothly and confidently.

5. Please rate the FR regarding how smoothly and confidently (vs. haltingly and hesitantly) (s)he administered the EHC interview.

- Very smoothly/confidently 71% (102)
- 26% (38)
- 3% (4)
- 0% (0)
- Very haltingly/hesitantly 0% (0)

Observers gave FRs very high marks with regard to how smoothly and confidently they administered the EHC interview. Almost three-quarters received the highest rating; 97% were rated in one of the top two categories; and the average rating was 4.7 on a 5-point scale (with 5 at the most positive end of the scale). Additional analyses (not shown) examined the relationship between FR experience with EHC interviewing and item 5's "smooth and confident" assessment. Not surprisingly, results of this logit regression analysis indicate a significant positive association – a higher number of previously conducted EHC interviews is associated with a more positive rating.

6a. Did the FR's administration of the EHC interview suggest that (s)he had been adequately trained on fundamental SIPP concepts?

- Adequately trained 71% (102)
- 27% (39)
- 1% (2)
- 1% (1)
- Needs additional training/re-training 0% (0)

Responses to item 6a suggest that observers judged FRs to have been adequately trained on fundamental SIPP concepts. In only 2% of cases did the observer place the FR at or below the midpoint of the scale, and again, with 5 representing the most positive end of the scale and 1 the negative end, the average rating was 4.7.

6b. Did the FR's administration of the EHC interview suggest that (s)he had been adequately trained on EHC techniques?

- Adequately trained 54% (76)
- 40% (56)
- 6% (8)
- 1% (1)
- Needs additional training/re-training 0% (0)

Observers' evaluations of FRs' preparedness with regard to EHC interviewing techniques, while still generally quite positive, were notably less favorable than those recorded for the previous item, concerning SIPP concepts. Only a little over half of the observers chose the highest point on the rating scale. Nevertheless, the vast majority of those who did not select the most positive option chose the next-most-positive, and as a result the average rating of 4.5 (on the assumed 5-point scale) was still very high.

7. Did the FR's administration of the EHC interview suggest that (s)he needed more hands-on practice to get comfortable with the EHC technique?

- Did not need more practice 72% (102)
- 21% (30)
- 6% (8)
- 1% (1)
- Needed a lot more practice 0% (0)

The vast majority of observers did not think FRs needed more practice. On a 5 point scale (5 being "did not need more practice" and 1 being "needed a lot more practice"), 94% of cases were given either a 4 or 5, and the average rating was 4.7.

C. Respondent Engagement; Special Challenges (items 8, 9, 10, 11)

The results from the final set of observer form items send mixed signals. Were respondents mostly quite engaged in the EHC interview, or was there substantial unhappiness about being approached yet again for a SIPP (or SIPP-like) interview, resulting in much "burn-out" and disengagement? How could it be that FRs reportedly responded well to the challenges they faced when many of their supposedly insufficiently-prepared-for difficulties were, in fact, central features of the EHC field test interviewing procedures which had been extensively covered in training? Such inconsistencies make it difficult to draw an overall conclusion about the challenges FRs faced or their skill at handling those challenges.

8. How engaged was the respondent in the EHC interview?

- Very engaged 38% (55)
- 31% (44)
- 24% (34)
- 5% (7)
- Very bored/uninterested 3% (4)

Observers judged respondents to be variously engaged in the EHC interview – in about equal measure they saw respondents as "very engaged," engaged at the second-most-positive (but unlabelled) level, or engaged at the mid-point level of the scale or below, including a handful perceived as "very bored/uninterested." On a scale of 1 to 5 (5 being "very engaged" and 1 being "very bored/uninterested") the average rating was 4.0.

9. Did this EHC interview present the FR with any especially difficult challenges?

- Yes 24% (34)
- No 76% (110)

Most EHC interviews seem to have been free of serious challenges, but observers perceived that they presented some form of special challenge in about one-quarter of the observed cases. Observers' "Please describe" notes suggest that most of those challenges had little to do with the structure or design of the EHC interview *per se*, but rather arose from extraneous matters, or problems common to all forms of interviewing. The most frequently mentioned challenge was respondents' dissatisfaction – in some cases their strong and expressed-in-no-uncertain-terms dissatisfaction – with being interviewed again, especially after having been told the survey was over. One respondent was particularly upset because at the end of the last production SIPP interview she had been promised a debit card, which she claimed was never delivered; when she inquired about it she was told it was no longer available. In a few other cases the respondents simply seemed particularly "burned-out," reluctant, or disengaged. One observer recounted a case in which four EHC interviews were conducted outside, over a fence, with 10 dogs on the other side, and with a respondent who was distracted not only by the dogs but also by the numerous phone calls he received (and answered) during the interview.

10. How well did the FR respond to those challenges?

- Very well 69% (22)
- 22% (7)
- 9% (3)
- 0% (0)
- Not well 0% (0)

In most cases, observers felt that FRs who faced serious challenges handled them adroitly. Slightly over 90% of their ratings were at the highest ("Very well") or second highest points of the 5-point scale, and there were no ratings below the midpoint of the scale; the average rating was 4.6. Additional analysis also suggests that FR experience might have played a role in their ability to handle difficult challenges – a logit regression (details not shown) indicates that the number of EHC interviews an FR had conducted was positively associated with his/her ability to respond well to the challenges respondents presented.

11. Did any issues arise during this EHC interview that were not dealt with (or were dealt with inadequately) in training?

- Yes 13% (17)
- No 88% (119)

In 13% of the observed EHC interviews observers perceived issues that seemed not to have been dealt with adequately during training. Examination of their "Please describe" follow-up notes suggests that the cited issues were often very central to the EHC techniques employed in the field test, and had certainly been "dealt with" in the training package – whether adequately or not is another matter. For example, one FR told an observer that interviewers had not been trained to use other domains to aid in dating events of interest. This is very unlikely; training materials placed heavy emphasis on this strategy. Not all training sessions were observed, of course, but in those that were observed there was no question that this issue was presented and discussed at length (e.g., Moore, 2008).

In two other cases, observers noted that an FR had trouble with the concept of asking about and recording respondents' status as of "now," and using that as an entry point to asking about the true reference period, calendar year 2007. One observer mentioned three interviews in which bolded instructions had not been read. Another FR seemed to have difficulty with the notion that one person's landmark event (a family vacation overseas) could apply to all household members. And finally, two observers mentioned situations in which a household member moved into a residence in 2008, causing the FR uncertainty about how to indicate this on the EHC.

As noted, all of these issues were covered in the training package developed for the field test, and some – e.g., the use of other domains as recall aids, starting each domain with a question about "now" – were a central focus of the methods to be used, and thus were covered extensively and repeatedly in the training materials. The fact that they surfaced in the observation reports as areas where the training might not have been adequate is somewhat troubling. It is possible that the training was in fact inadequate on these issues, and/or that the trainers, for whom the EHC concepts and methods were as new and unfamiliar as they were to the trainees, were not equipped to deliver it effectively. Another possibility is that EHC methods, because they are so new to Census Bureau field staff, require additional efforts – refresher training sessions, perhaps – in order to ensure that they "stick."

IV. Results – Themes from Observer Summaries and Open-Ended Comments

In addition to their follow-up comments to specific questions, observers also provided a wealth of other comments, both on the Observation Reports (e.g., in item 12, which offered space to record "any other comments") and in the optional summaries many observers wrote describing their general experiences. Below I summarize major points from these other comments, organized around several major topic areas which were common to many of them. A notable feature of these additional comments is the less positive picture they paint, relative to the responses to the closed-ended questions, of the implementation of the field test.

A. Domain-Specific Comments

Landmark Events: The nature and role of landmark events and the procedures for capturing them dominated observer comments. Requesting landmark events was a new experience for FRs, and providing them was a new experience for respondents. Not surprisingly, this resulted in occasional difficulties. Proxy interview landmark event procedures were not fully understood. FRs sometimes probed for new landmarks in the proxy interview, even though they were interviewing the same person, which suggests a lack of understanding of the nature of landmark events and their role in an EHC interview. This was not true in all cases, of course. Observers noted several situations in which FRs and respondents naturally used landmarks (and other domain events) from prior self-response interviews to date events in proxy interviews.

Some FRs made only very weak attempts to elicit landmarks, and on occasion skipped that part of the interview entirely. Observers also noted the opposite problem – FRs who pressed too hard for landmark events, who spent far too much time trying to draw them out when they were not immediately forthcoming, even on occasion supplying a set for the respondent to use. These FRs, it seemed to some observers, did not appear to understand that the landmarks were to be used as tools to elicit data, and not as data themselves. Consistent with this notion, many of the

same FRs who pressed too hard also never made use of the landmarks during an interview. Here again, though, some observers noted the opposite difficulty – FRs who injected landmark events into the interview conversation in the absence of any evidence that the respondent was having trouble providing an event date.

To many observers, the scripted introduction to the landmark section was problematic in various ways: it was too long (the “glaze over” effect); it didn’t adequately convey the justification for requesting the information; its examples focused too much on negative events (death, divorce, job loss), getting the interview off to a bad start; the examples also focused on events that were too life-shaking and major for a one-year reference period, setting the bar too high for respondents, and causing them to overlook more mundane events that would nevertheless serve very well as landmarks. Some respondents did not seem to grasp that the introduction provided *examples* of landmark events, not a comprehensive *list* of in-scope events, and thus if none of the examples fit their situation they failed to report any landmarks. One observer remarked that the use of landmarks seemed “not quite organic to the flow of the interview.” A similar comment from another was that there seemed to be a “disconnect” between the landmark event question and the rest of the interview. The landmark event question had a more psychological and inexact tone to it, in contrast to the rest of the questions in the interview which were practical and solid – housing, jobs, money, health insurance, etc.

Another theme around landmarks was the lack of need for them in cases where respondents’ circumstances were straightforward and easily recallable, and especially where nothing had changed. Several observers noted the frequency of cases where nothing changed in any domain in 2007 (indeed some circumstances had been the same for several decades). These respondents had no trouble completing the interview and did not need the landmarks, or any of the EHC’s special features, to aid their memories.

In some situations, landmark events did not arise until after the interview had proceeded to the substantive domains. For example, one respondent anchored events asked about in the calendar to an initially unmentioned landmark of finishing school. In another situation an event not initially identified as a landmark prompted a respondent to continue thinking of anchoring events as he spoke, and the FR continued adding to the 2007 landmark events on the landmark domain of the calendar. And some observers suggested extending the time period for which landmark events were collected, noting that in some cases major events from both 2006 and 2008 helped respondents anchor events in 2007.

Residences: One observer mentioned confusion about where a child at college resided. “At home” was indicated since the student was a permanent resident there.

School Enrollment: In a proxy interview for a spouse who was in a graduate program, the FR recorded that an enrollment spell covered the entire year, without probing to verify that the spell was actually continuous, even through the summer months.

Labor Force/Employment/Unemployment: Observers mentioned a number of issues with regard to the EHC instrument’s employment-related domains. Most, however, seem to represent difficulties that plague reporting of labor force and earnings questions in general, across all survey settings, rather than anything specific to the EHC method. For example:

- how to handle summer break for teachers;
- accounting for pay tied to seasonal employment;
- wage rate reporting for income earned on commission;
- spell and wage rate details for freelance work;
- the distinction between paid and unpaid labor (e.g., farm work which generates no immediate income, or work in a family business in exchange for an allowance or gas money).

Social Welfare and Program Participation: An observer noted a case in which a respondent reported that her food stamps benefit amount varied from month to month; the FR asked whether there was an amount which applied “most” of the time, and apparently recorded that for the entire spell. Another observer commented that most respondents did not seem to be familiar with the “TANF” acronym.

Health Insurance: Several observers noted that the complex design of this section of the EHC instrument made filling it out accurately a great challenge for FRs. Two specific issues that were mentioned were the complexities of the many possible navigational “paths” through the question series, which caused FRs frequent difficulty in determining where they should proceed next, and the fact that the text was so densely packed that key instructions often escaped FRs’ notice. These problems may have affected FRs’ ability to record accurate information about health insurance coverage. For example, one observer noted an FR’s confusion about how and where to record his wife’s second insurance policy. Other comments seem to reflect more general issues, unrelated to the design of the EHC:

- how to categorize coverage through what was initially a job-related plan, but which the policy-holder maintained during a layoff period by fully paying the premium himself;
- confusion/uncertainty regarding Medicare and Medicaid.

Assets: Observers’ comments about this domain were all concerned with the difficulties and complexities of the asset domain itself, and not about EHC methods. For example:

- confusion about the limitation to interest earning checking accounts;
- conflicting accounts by spouses about assets held jointly;
- confusion, especially in proxy interviews, regarding asset type distinctions;
- the lack of a place to record pension information.

Income Amounts (General): Here again, observers’ comments focused exclusively on generic, rather than EHC-related issues, mostly involving respondents’ lack of information about exact amounts, especially in proxy interview situations. (It is possible that these problems may be exacerbated in the earlier months of a longer reference period, but observers made no mention of this.)

B. Cross Referencing

Several observers cited examples in which FRs took full advantage of the EHC method’s ability to cross-reference events across domains, and the calendar’s potential as a visual aid to help spot issues needing additional probing. For example, one FR used the calendar to cross-check a respondent’s search for work against his summer break from school. Another FR used relocation

and job loss to help respondents date the start and end of spells of health insurance coverage. In another interview an FR used other domains to help the respondent pin down the type of health insurance coverage. This type of cross-referencing was also observed to occur across interviews: one observer reported that an FR drew on information from a prior self-response interview to assist a respondent who was trying to provide proxy data for other household members.

C. Reference Period Issues

The EHC instrument was designed so that the initial question in virtually every domain asked about the respondent's status "now": "Are you enrolled in school now?" "Are you working for pay now?" This was intended as an easy-to-report anchor point at which to start the respondent off in reporting about the true reference period of interest, calendar year 2007. Observers noted that this design feature caused some FRs some confusion and uncertainty, particularly in the more complex sections of the interview, such as the health insurance and employment domains. Multiple comments mentioned that the health insurance "now" question seemed to lead respondents to forget about the reference period in 2007. One FR was unclear why the labor force question asked whether a respondent worked now, but did not ask further questions on this before asking about work in 2007. The same FR was unclear as to the purpose of the empty boxes adjacent to the January and December boxes in the labor force section, but did seem to understand the purpose of these boxes in earlier portions of the calendar.

D. Respondent Feedback

Not surprisingly, observers reported that many respondents made positive comments about the short length of the EHC interview (probably without realizing that it included only a subset of SIPP content). A respondent who had initially refused to do the interview later said it was a much better interview than production SIPP, and that he could see how people with complicated lives would be served well by an EHC interview. Other respondents expressed positive sentiments about the potential for a reduced frequency of SIPP interviews.

E. Data Quality

One observer commented positively about perceived data quality: "the [EHC] interviews represent reasonable and accurate data and do not show evidence of satisficing." Another noted that EHC techniques would likely be much more effective than the standard question-by-question approach used now in SIPP, in particular for people with very complicated lives. A third recounted a respondent's spontaneous comments about the effectiveness of the EHC techniques: the respondent was "willing to work through remembering year and commented after [the interview] how hard he had to think but that it was effective to get all the detail." Other observers were less sanguine about data quality. One noted a case in which a respondent used her granddaughter's birth date as a landmark event in her own interview and two other proxy interviews. The child's mother returned to the home during the proxy interviews, at which point she revealed that the grandmother had used an incorrect date, a mistake which could have affected data quality in all three of the interviews she (the grandmother) provided.

F. FR Experience and the EHC Learning Curve

While some observers commented that FRs seemed to become comfortable with EHC techniques fairly quickly, others saw a need for more time to become accustomed to the flexibility of event history calendar interviewing and its particular methods. Some observers felt that item nonresponse in a few areas might decline as FRs gained more EHC experience.

G. Domain Sequencing and EHC Flexibility

Some observers noted that FRs seemed to adapt rather smoothly to the greater flexibility offered by the EHC interview style. One mentioned an FR's comment that "the format was more conducive to fostering a conversational tone to the interview, which contributed to building rapport." On the other hand, a few observers cited examples in which FRs did not display flexibility to the extent that they could have, because they failed to jump between domains whenever a respondent brought up a survey topic other than the one being discussed at a particular moment. For example, one observer noted that the FR did not start with the labor force section when the respondent mentioned rejoining her previous employer as a landmark event. Another observer commented that an FR did not go immediately to the health insurance domain when a respondent mentioned a supplemental insurance policy. (The observer did note, however, that the FR remembered the supplemental insurance comment and mentioned it later when the topic was reached.).

H. Primed Households (and FRs)

Several observers noted that respondents who had participated in SIPP for years were very familiar with the content and were ready to report the dates that SIPP asks about almost without having to be asked. Some observers noted a similar issue with FRs, and their familiarity with previously-interviewed households, which some felt might have interfered with the FR fully exploiting the EHC technique. For example, one such "primed" FR used his pre-existing knowledge about a household – rather than landmarks or domain events – to prompt a respondent. Another observer noted an FR who did not ask for any landmark events and made no attempt to use them. This FR had a very good, long-standing relationship with the household, having interviewed them for several years. The observer speculated that perhaps because of the FR's long history with this household, he did not feel such a need to ask landmark events since he already knew about their lives.

Another aspect of primed households was "SIPP fatigue," which was mentioned by many observers. Many field test respondents had participated in SIPP for years, and were reluctant to do so again, especially after having been told that they were finished after wave 12. Some of these respondents seemed particularly disengaged with the EHC interview.

I. Training Issues

Observers mentioned a few issues regarding training. One thought it would be helpful to have more training examples geared to different populations (e.g., students, retirees), in particular with regard to the sorts of events that might be relevant to them as examples of landmark events.

Another observer recommended increased training emphasis on use of the physical calendar to fill in missing gaps and to place events in relationship to each other. A third wondered about the adequacy of training to overcome entrenched patterns, especially with regard to the EHC's encouragement of much greater flexibility. Finally, one observer focused on training related to SIPP content. This person felt that the observed FR (a part-time ACS interviewer) was unfamiliar with basic SIPP categories such as education level and race, and did not seem comfortable conducting the EHC interview.

V. Summary and Recommendations

As noted above, observers' supplemental comments, more than their closed-ended responses to the Observation Report form, suggest that the results of the 2008 SIPP EHC field test need to be examined and interpreted carefully. To the extent that the comments are reliable – and generalizable to the whole study – many suggest the likelihood that in some important ways the implementation of the field test was far from perfect. The study's analysts need to be sensitive to the potential role played by these imperfections, and to the fact that the field test results may be more related to the manner in which it was conducted than to EHC methods themselves.

Using the observers' responses to the Observation Report form and their other comments as a starting point, I offer the following recommendations. I hope that they, and this report as a whole, will prove to be a useful adjunct to the field test data themselves in evaluating whether and how the re-engineered SIPP program should move forward with the use of EHC methods.

1. To engage respondents in interviews with minimal time lapse after the reference period, and to minimize confusion regarding the intent of the contrast between current and reference period events:
 - a. Conduct interviews as soon after the 12-months' reference period as possible.
 - b. To the extent interviews cannot be collected immediately, collect information for target and subsequent time periods as if the entire time has equal importance, for the sake of FR and respondent clarity.
2. To allow FRs to focus on the event history calendar style:
 - a. Select FRs from among those with SIPP-experience
 - b. For those without SIPP experience, allow additional practice on SIPP elements and select from interviewers who are savvy about entering new situations, perhaps having interviewers role-play prior to hiring.
3. To maximize collaboration between FR and respondent:
 - a. Encourage "mutual engagement" (Greenspan and Bolkosky, 2006) in which the FR and the respondent are co-involved in the survey.
 - b. Encourage FRs to be intentionally "present in the moment" more than to focus on particular rules of interview conduct.
4. To draw respondents' attention to the new technique:
 - a. Mention the EHC technique at the beginning of the survey, along with a bit of information about the approach. Inform respondents that the interview will be

more conversational than most, and that the first question is designed to help them think about answers to other survey questions in the context of their lives as a whole. (This recommendation is based on the fact that respondents are accustomed to more standardized interviews and do not anticipate a request for “salient personal events” at the beginning of an interview.)

5. To lessen emphasis and formality of the word “landmark” given the one-year reference period⁴:
 - a. Omit mention of “landmarks” in the presence of respondents, since the word is not commonly used and may convey a meaning other than intended.
 - b. Encourage FRs to brain-storm and improvise wording based upon the interview context.
6. To elicit respondent-relevant landmark events:
 - a. Probe for memories of more common personal or public events relative to those mentioned in the 2008 introduction (e.g., Loftus and Marburger, 1983).
 - b. Respondents in need of more input could be prompted about changes in usual activities (see Auriat, 1993): “What were some of the things that happened to you, or activities you participated in last year?” Also, as Tanur (1987) notes: “Respondents often spontaneously use personal landmarks when trying to recall an activity or event [p. 472],” so raising respondents’ awareness of their existing thought patterns may help in eliciting landmarks events.
 - c. Replace examples from the 2008 introduction, e.g. vacation, ill-health, or a birthday party, with examples from the training manual. (Life-course examples in the 2008 pretest calendar seemed to inappropriately contrast with the one year reference period.)
7. To distinguish domain-related events that occurred outside the reference period:
 - a. Ask about landmark events from the past couple of years, and then narrow down to the 12 month reference-period. Landmark events from periods prior and subsequent to the reference period will assist FRs and respondents in determining whether domain-related events occurred before, during or after the intended reference period.⁵
8. To more specifically date events:
 - a. Indicate desired level of date distinction for landmark events, e.g. to distinguish months or portions of the reference period rather than referencing the entire year.⁶ (Note that the presence of fewer landmarks increases the difficulty of dating events that need to be dated.)

⁴ Auriat (1993) notes: “Efficiency of a particular landmark event may vary with the length of the retrospective recall period, and with whether or not events are recurring” [p. 167], and furthermore that the “efficiency of a landmark event ... may be ... related to ... the type of questioned events” [p. 187].

⁵ Auriat’s (1993) comment that “shorter retrospective recall periods, although decreasing omissions, may increase telescoping errors” [p. 168], further points to the helpfulness of obtaining landmarks for the periods prior and subsequent to the desired reference period.

⁶ See Auriat (1993) for a discussion of landmark events identifying shorter time periods within any given reference period.

9. To ease the process of collecting landmark events:
 - a. Encourage FRs to record family events if they arise naturally.
10. To include landmark events for a cross-section of the U.S. population⁷:
 - a. Brainstorm with FRs about landmark examples that can be used among various sub-sections of the population, such as retirees and students.
 - b. Continue to employ FRs with strong Spanish language skills in areas with higher proportions of Spanish residents.
 - c. Consider translating the instrument into Spanish to allow for more consistent administration of non-calendar related questions.
 - d. Employ FRs with other language skills such as Chinese, for on-the-spot translation (interpretation) of the nature that seemed to work well in Spanish pretest interviews.
11. To supplement respondent-generated landmark events:
 - a. Consider generating predetermined or “‘natural’ landmark events that are most often cited by the whole or certain segments of the national population” (Auriat, 1993, p. 187). In an electronic instrument, items of relevance to various subpopulations could possibly be preprogrammed for use along with elicited landmarks (e.g. Cinco de Mayo, Chinese New Year, etc.).
12. To minimize misdating subsequent self and proxy domain events:
 - a. FR’s should make a reasonable attempt at having respondents accurately date landmark events.⁸
 - b. When a respondent mentions an event in relationship to a landmark or domain event, have FR’s restate the events and the date, and request respondent confirmation (see Balán et al., 1969).
13. To tap the autobiographical memory of proxy respondents:
 - a. Have FRs copy landmark events from self to proxy interviews, as was intended for the 2008 pretest but was not consistently applied.
14. To increase respondent interest and engagement:
 - a. Encourage FRs to show the calendar to respondents if and when appropriate.⁹
 - b. Encourage FRs to follow the sequence of respondent conversation to the extent the FR is comfortable doing so.¹⁰

⁷ Auriat (1993): “[T]he degree of saliency of a landmark event may vary across populations” [p. 167].

⁸ In measuring residential mobility, Auriat (1993) shows that an incorrectly dated event increases the likelihood that a subsequent event will be dated incorrectly (see p. 184). This supports looking at events “in a transverse fashion” such as that offered by EHCs, rather than in a “longitudinal” manner within each domain [p. 185].

⁹ Auriat (1993) notes the importance of respondents “visualizing . . . events” [p. 185] in history calendar interviews. See also Lewis et al (2008).

¹⁰ Tanur (1987) recommends following a “natural order of retrieval” [p. 472].

15. To maximize FR engagement and top-down understanding
 - a. Have each FR role-play as a respondent and as an interviewer during the training period.¹¹
16. To encourage a respondent-centered approach based on the circumstances of each interview:
 - a. Encourage FRs not to feel pressured to apply training examples in a specific manner, but to weigh ideas from training along with their own *modus operandi*, and the flow of conversation in each respondent context, for a uniquely productive outcome. Particularly emphasize the need for FR's and respondents to be at ease during the interview.
 - b. As an FR said in regard to the health insurance section, teach "FRs to work through the section[s] rather than trying to script [them] as we did." This is particularly important for the landmark section.

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Appendix A: Observation Instructions

SIPP-EHC Field Test Observation Instructions

A. PREPARATION

1. Orientation:
 - Review the 2-page Field Observation Guidelines (Attachment A) regarding appropriate observer behavior (e.g.: proper attire, contacting the local Field Representative, etc.).
 - Review instructions from the Field Division regarding contact information at the local site; be sure to have back-up names and phone numbers of staff if your local contact person can not be reached.
 - Read through the SIPP-EHC Field Test Observation Report form to refresh your memory on the types of behaviors to watch for during your observations.
2. Materials:
 - Print out about 20 Observation Report forms (you'll need to fill out one for each CALENDAR completed per household).
 - Bring a few steno notebooks

B. BEFORE THE INTERVIEW

1. Observer: explain your role to the interviewer:

My name is _____ from _____. I am here to observe your work and evaluate these new SIPP-EHC interviewing procedures and forms you learned to use in training. This will help us understand the new calendar method of interviewing for SIPP so we can improve procedures and forms for the next test."

2. Interviewer/Observer: explain the role of the observer to the respondent:

This is ____ from _____. He/she is observing me today to see how well these new interviewing procedures are working so that we can make improvements to our data collection methods.

C. DURING THE INTERVIEW

Please write down in a steno notebook anything that seems noteworthy, paying particular attention to these kinds of behaviors:

- Gathering landmark events of personal significance to the respondent
- Respondents having trouble remembering when an event occurred
- Interviewers offering any help to respondents who are trying to remember dates by:
 - referring to landmark events
 - referring to events in another domain of the calendar
- Respondents seeming engaged or disengaged with the EHC form itself and the interview process

D. AFTER THE INTERVIEW

1. Thank both the respondent and the interviewer.
2. Complete the SIPP-EHC Field Test Observation Report. This was meant as a guide to record observations. Please fill this out but also include any interesting observations from your steno notebook that are not captured in this form. If your hand-written notes are legible just attach them to the observation report form; otherwise please type up your notes and attach them to the Observation Report form. Please do this for each EHC interview you conduct as soon after the interview as possible, while the information is still fresh.
3. When you return to the office, deliver your completed Observation Report forms (and hand-written notes, if applicable) to Joanne Pascale in SRD (x34920; 5K020F, near the red elevators).

Thanks!

[Attachment A: Field Division's Guidelines for Observers]

MEMORANDUM FOR: All Observers

From: Marvin D. Raines (signed 8/7/96)
Acting Chief, Field Division

Subject: Guidelines for Observers to Census Regional Offices and Field Representative (FR)
Interviewing

Make arrangements to review the regional office or the various field operations through the appropriate Field Division headquarters program branch or team. If you notice an incorrect application of written procedures or other deficiencies, feel free to discuss such matters with the regional supervisory personnel. However, written procedures can only be changed through the appropriate headquarters program branch or team.

Should you require hotel reservations to be arranged by the regional office, make your request through the appropriate headquarters program branch or team **no less than 10 working days before the date of the visit**. The information will be relayed from the regional office to the visitor or his/her liaison. You are responsible for guaranteeing and canceling your own transportation and hotel reservation.

The regional office does its best to accommodate each observation request. Doing so often requires shifting workloads or making special arrangements with the field representative or office staff. Please provide enough "lead time" for the regional office to make adequate arrangements. Making last minute arrangements or changes is strongly discouraged and may not be able to be accommodated.

A. Regional Office Observations

Please follow these guidelines when observing regional office activities such as training:

1. Identify yourself (by showing a current Commerce Department badge) to an appropriate staff member upon arrival. This may be the regional director, assistant regional director, or program supervisor. You are encourage to meet and become acquainted with members of the regional office staff.
2. While attending training sessions, you are cautioned to refrain for distracting, interrupting, or otherwise interfering with progress of the session. You may, on request, comment or advise on matters involving interpretation or clarification of training materials or other written instructions if you are knowledgeable about the topic.
3. In order for Field Division to continuously improve its services, you are requested to prepare an evaluation memorandum. Please give all comments which evaluate the instructor/trainer careful consideration and diplomacy. Limit distribution of any memo with adverse comments about the trainer to the appropriate program branch chief/team

leader and Chief, Field Division, who will determine any subsequent Field Division distribution. Please confine adverse oral comments or remarks related to the Field staff performance only to the appropriate regional director and/or the program branch chief/team leader.

B. Field Representative (FR) Interviewing Observations

In the process of carrying out FR observations, it is expected that the following conditions will prevail:

1. The regional office will notify the FR that he/she will be observed and provide the FRs' name and phone number to the observer. You are expected to contact the FR well in advance to determine where and when you will meet. The meeting place may be the regional office or a mutually convenient and recognizable public place such as a post office, court house, city hall, etc. At the conclusion of the observation you may request to be dropped at the same or another mutually convenient location. Please treat the FR with the same respect and courtesy as you expect for yourself, and refrain from asking him/her to return you to airports or other locations that are outside the normal travel pattern of the day's work.
2. It is expected that you will conform the FRs' work schedule including the hours to be worked and locations to be visited. This may entail late afternoon or evening work - FRs rarely work early mornings.
3. Proper attire is extremely important. When making arrangements with the FR, you are encouraged to inquire about the most important attire. The FR has a difficult job even under ideal conditions. It would be most unfortunate should an observer choose attire that might be offensive to that segment of the population being interviewed. Please remember to carry your identification badge to show at a respondent's household.
4. The FRs' residence is generally off limits to observers for any purpose. Do not use either as a point of contact or a place to observe or review the FRs' work. Should an occasion require a review of completed work or observation of telephone interviewing techniques, make arrangements that will preclude the use of the FRs' home.
5. Do not make any comments during the interview unless the respondent specifically addresses a question to you. Similarly, do not make any effort to critique the FRs' performance while in the household. As stated, you are encouraged to write up the results of the observation, with distribution to the appropriate Field Division headquarters program branch chief/team leader, and Chief, Field Division.
6. You must remember your responsibility for maintaining the confidentiality of the data to which they have access during the field activities. You may not disclose the data in a form that will permit identification of an individual respondent (including persons, corporations, partnerships, associations, and other organizations). Also, you may use the data only for the purpose for which they are collected, specifically, the data may not be used for law enforcement (criminal or civil) or regulatory purposes.

Appendix B: Observation Form

Date: _____ / _____ /2008

Observer:

State: -IL -TX FR Code: _____ # EHC Interviews this FR has conducted:Case ID: _____ Line #: _____ Type: -self-resp -proxy

SIPP-EHC Field Test Observation Report

Fill out a separate observation form for each individual EHC interview you observe.

1. In the EHC interview for this person, did you observe the FR try to help the respondent recall the date of an event by reminding him/her of a **LANDMARK EVENT**?

Yes - Please describe what happened:

No

DK

2. In the EHC interview for this person, did you observe the FR try to help the respondent recall the date of an event by reminding him/her of **AN EVENT FROM ANOTHER EHC DOMAIN**?

Yes - Please describe what happened:

No

DK

4. In the EHC interview for this person, did you observe the FR **MISS AN OPPORTUNITY** to bring up a landmark/prior domain event to help the respondent recall some date?
 Yes - Please describe what happened:

- No
 DK

ITEMS 5, 6, AND 7 CONCERN THE FR's GENERAL HANDLING OF THE EHC INTERVIEW:

5. Please rate the FR regarding how smoothly and confidently (vs. haltingly and hesitantly) (s)he administered the EHC interview:

Very smoothly/
 confidently Very haltingly
 hesitantly DK
- - - - -- - - - -- - - - -- - - - -

6. Did the FR's administration of the EHC interview suggest that (s)he had been adequately trained. . .

6a. . . on fundamental SIPP concepts?
 Adequately Needs additional DK
 trained training/re-training
- - - - -- - - - -- - - - -- - - - -

6b. . . on EHC techniques?
 Adequately Needs additional DK
 trained training/re-training
- - - - -- - - - -- - - - -- - - - -

7. Did the FR's administration of the EHC interview suggest that (s)he needed more hands-on practice to get comfortable with the EHC technique?

Did not need Needed a lot DK
 more practice more practice
- - - - -- - - - -- - - - -- - - - -

