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**Event History Calendar Field Test
Field Representative Focus Group Report**

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In 2008, an initial field test was conducted to determine whether the Survey of Income and Program Participation (SIPP) could be conducted using Event History Calendar (EHC) methodology (administered once per year), and still 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. A paper-and-pencil field test was conducted in April through June in two sites – Illinois and Texas – and collected data covering the 2007 calendar year. The prototype EHC 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%.

Several evaluation methods are being employed to assess the results. Data derived from the EHC will be compared to production SIPP data collected from the same people for the same time period (that is, the SIPP 2004 panel, Waves 10-12). Both EHC and SIPP data will also be compared to administrative records where possible. Respondent and field representative (FR) debriefing forms were administered at the time of each interview, and a report of those results is currently in preparation. Observers were dispatched to observe live interviews and report on their experiences. A paper summarizing the observers’ reports has been completed and is available at <http://www.census.gov/srd/papers/pdf/ssm2008-16.pdf>. Finally, after all interviewing activities were completed, focus groups were conducted with FRs in both sites to glean more about their experiences with the EHC field test. This report presents findings from the focus groups.

Topics covered included gaining cooperation, navigating the flow of the EHC and recording answers, managing both scripted and unscripted questions, the landmark events section, and training (see Appendix A for the Focus Group Talking Points). Each focus group lasted approximately two hours. Attempts were made to conduct the focus groups soon after the interviewing was completed, and to keep groups rather small (under 10 people) but due to scheduling constraints some compromises had to be made. Only one session could be held in the Dallas Regional Office (RO). The group included 13 FRs and three Supervisory FRs and the session was held on May 13, 2008. On July 10, 2008, two smaller sessions were held in the Chicago RO with eight FRs in the morning session and nine FRs in the afternoon session. The Texas group included FRs from each of four sites (Austin, Dallas-Fort Worth, Houston and San Antonio). Participants in the Chicago groups were determined by assignment area; one group was comprised of FRs whose assignments were in Chicago, and the other of FRs with assignments outside Chicago.

Below is a composite summary of comments across all three groups. The first section (Part A) summarizes interviewers’ comments about general preparation for and administration of the EHC. Part B presents a section-by-section summary of results (note if a given section is not listed it means FRs had no noteworthy comments). Part C concludes with comments on features particular to the EHC interviewing technique.

A. PREPARATION AND ADMINISTRATION

1. Training

FRs were given a four-day training. Half a day was spent on administrative issues, three days on the EHC itself and, for new hires only, another half day was spent on general interviewing techniques. Most FRs said they felt fairly well-prepared and confident when they set out to do their first EHC interview, and all agreed that once they got started it went well and they felt adequately trained. Some felt a bit nervous and made an attempt to conduct their first one or two EHC interviews with households they were already familiar with through their previous SIPP interviewing experience. However, for her very first case one FR happened to go to a household where she conducted five EHC calendars. She said this was a bit stressful but that it went fine and she felt adequately trained. As for hands-on practice, most FRs felt it was sufficient, the scenarios were useful, and switching between trainers and trainees was a good approach. Some said the health insurance section was problematic, and thought it may have worked well on a laptop but found it confusing on paper. In terms of the amount of training, most FRs seemed to think the balance was about right (not too much, not too little). Some also said they referred to the manual, were able to find what they needed, and thought it was a useful training tool. During the editing, RO staff found the manual to be especially helpful and referred to it often.

In the Chicago RO, training was decentralized and thus a “training of trainers” was conducted. A supervisor commented that this training went especially well. She noted that the trainers felt they learned a lot about the background and purpose of the project, which gave them reassurance, enthusiasm and confidence they could then to bring to their own trainings. [In the Dallas RO, training was centralized so there was no training-of-trainers].

2. Advance Letter

Prior to the start of interviewing, an advance letter was sent to respondents to inform them of the field test. The letter thanked respondents for their prior survey participation and explained that an FR would be contacting them shortly to conduct a test survey using new methods. The letter also provided some information about the SIPP data and how it is used, assured confidentiality, and provided a list of Frequently Asked Questions (FAQs). In the focus groups, FRs said the advance letter came up at almost every visit to the doorstep. FRs said due to the advance letter, respondents generally knew they were coming, and it was a very useful tool.

3. Debit Card

Field test procedures included a \$40 debit card as a respondent incentive to be given to all participants (not just at the discretion of the FR in difficult-to-persuade households). FRs varied in their strategy for using the debit card. Some offered it right at the beginning of the interview as an inducement, while others waited until the end and presented it more as a thank-you gift. Most agreed, though, that if they met resistance at the beginning of the interview they used the debit card.

FRs described a wide range of reactions to the debit card by respondents. Some FRs felt the debit card was absolutely critical in some cases, and that respondents would not have participated without it. In particular, some respondents who were told at the last wave that the survey was over were especially annoyed at being contacted again, and for them FRs felt the debit card was necessary. Some respondents seemed used to the debit card and may have come to expect it. In general, though, FRs said most respondents really appreciated the debit card, some making comments like: “great – we are finally going to get paid for this!” There were a few respondents (estimated at around 10%) who refused the debit card – either because they didn’t want or need the money, they felt participating in the survey was a civic duty, or they were generally hostile to the idea (one respondent said she was going to send the debit card to her Congressman to show how the government is wasting money). And finally, supervisors reported that some respondents had logistical problems in using the card.

4. Paper and Pencil versus Laptop Mode

The standard SIPP is conducted using a laptop, while the EHC was conducting on a hard copy questionnaire. Materials included a control card (2 pages) and EHC questionnaire (5 pages), all printed on very large (11” by 17”) paper stock. There was also a one-page flashcard and a 3-page respondent debriefing questionnaire. Sometimes the sheer volume of paper was daunting, to both FRs and respondents. FRs thought some respondents saw the large amounts of material and assumed the task would be much more involved than it actually was. Most of the time FRs were invited in and allowed to lay out the materials on a table, although some FRs reported that they conducted a couple of interviews on the doorstep.

In many cases, both parties were so accustomed to conducting the survey on a laptop that using paper/pencil required some adjustments, especially with regard to the skips and flow. But all agreed that once they got started the interviews went smoothly, and that the format was not so imposing as to impede good data collection. One FR said that when conducting the regular SIPP using a laptop, respondents would fail to report jobs that they did report in the paper-and-pencil survey. The FR speculated that since the respondent could see on the form that there was not an overwhelming number of questions coming up for each job, they reported more jobs.

B. SECTION-BY-SECTION COMMENTS

1. Control Card

In this section of the interview, FRs collected the names of all household members and certain demographics (e.g.: age, sex, race). FRs reported that the matrix layout of this section worked very well, that it generally went smoothly, and that Section 3 (on spouse/parent relationships) posed no major problems. Many respondents volunteered information on relationships while they were providing the roster, and most FRs were aware that they could simply verify this (e.g.: and you said Joe was your husband?), rather than ask questions from scratch. When the information was not volunteered, or there was ambiguity (e.g.: children with the same last name who were not identified as a son or daughter up-front) FRs would ask.

FRs had no trouble identifying whom in any given household should be interviewed, although one FR commented on a parent's judgment to allow a 15-year-old to respond as an "adult." No one reported interviewing at a household with more than six people (thus no one used the second page of the control card).

As for the contact history, FRs had no trouble using the outcome codes and tracking the history of contacts. Some FRs said it would have been useful to have the contact history from prior interviews.

Some respondents, inevitably, complained that the same information was collected in all prior waves over the course of four years, and did not understand the point of re-asking these questions each time. Another inevitable issue that came up was race and ethnicity; FRs noted that many Hispanics consider "Hispanic" to be a race and were unwilling to choose from among the given race categories.

2. Landmarks

The first section of the calendar itself asks respondents to think of important events in their lives over the past year that might help them anchor or remember dates of other events. FRs seemed to share the general sentiment that the landmark section did not go over well with respondents. The introduction was long and wordy, and the section in general seemed to slow things down and delay getting into the substance of the survey. Some respondents thought it was silly – especially given the volume of questions they expected (based on prior experience) as well as the size of the materials FRs were carrying – and wondered about the purpose of this "nonsense" section. Some respondents knew it wasn't part of the previous survey and asked why the government wanted this information now. Though the introduction does give the rationale for this, it was too long and by the end of reading it respondents were often a bit lost. When interviewers had the opportunity to explain the general concept of landmarks (i.e.: that some events can help trigger the recall of other events), and to explain that this was a test to see if we could get better data by going out just once a year, instead of three times a year, some respondents seemed to understand.

Other more specific themes dominated the discussion over this section. First, FRs said many respondents had trouble coming up with landmarks (one FR used the "deer in the headlights" metaphor), since they felt they'd had no important life events in the past year, and some even seemed to lament this situation. In these cases FRs adjusted and probed for more generic-type events (such as birthdays and anniversaries) and suggested events like seasons of the year, children starting back to school, etc. One FR made the point of emphasizing to respondents that we wanted to know about events important to *them*, not necessarily the example events given in the introduction.

A second dominant theme was the tone of the introduction. Most FRs felt the content (mentioning deaths, divorce, injury, illness), started things out on a bad note, engendered sore feelings, and brought up events that most respondents didn't want to talk about. Again, FRs would adjust by using different, more positive examples, such as vacations, promotions and visitors.

The third issue FRs brought up was the landmarks' lack of utility. FRs said there were very few opportunities to actually use the landmark events within the domains of the calendar because most respondents had no changes to report, and when they did, they rarely had trouble remembering when the transition occurred. Furthermore, often the landmarks were not substantively related to any of the domains of the calendar, so they were hard to incorporate into the interview. One FR said the only time a landmark came into play was when a military wife used her husband's deployment into the military to help her remember when she worked. Another FR, though, had a more positive view and said a respondent reported having a baby as a landmark and this came in very handy in later sections. She was able to recall when she started receiving Medicaid because it was when she found out she was pregnant, and the birth date helped her remember when she got WIC benefits. Her husband was also disabled, and this helped her know when they started receiving food benefits. FRs did say they sometimes use this type of parallel probing even in the regular SIPP on occasion.

A final issue, in contrast to respondents who could not think of any landmark events, was that some respondents gave too much detail (e.g.: talking at length about their schedule of insulin shots for diabetes, their hypertension complications, etc.), which would become very time consuming.

FRs agreed that training may not have emphasized enough that the landmarks were not important data in and of themselves, but were simply a way of gathering information that could be helpful for recall in later sections of the interview. Indeed, FRs did not seem to fully grasp this concept; for example, one FR said that respondents got irritated when she pushed them to come up with at least two landmark events.

3. Residence

FRs began this section by asking respondents when they moved into their current residence. If they had moved in prior to January 2007, and they'd lived there continuously, no further questions were asked. If the respondent had moved to the current address sometime after January 2007, respondents were asked for the addresses of previous residences. Once addresses were established, interviewers asked whether the residence was some type of public housing. This section seemed to go fairly smoothly, with the exception that some FRs chronically overlooked the "type of housing" box.

4. Labor Force and Employment Summary

In this section respondents were asked to report any work they had done since January 2007, including jobs, work in a business and informal work such as odd jobs and consulting. Details about this work, such as employer name and earnings, were also asked about. Unlike other sections, which ask questions at the month-level, the labor force-related sections were designed to capture dates at the "month-third" level – that is, whether the work started or ended in the beginning, middle or end of the month. FRs generally agreed that collecting month thirds worked well, but some said it was a bit of a challenge because most people think of work in terms of quarters. And while several FRs said some respondents provided exact dates of employment

changes, they also noted that farmers had difficulty with even the month-thirds level of detail. FRs felt the month-thirds worked well in combination with the employment summary just below the main labor force section, especially for respondents with a lot of job turnover. For example one FR, who interviewed someone who had had five employers, said this section went fine; the respondent was working for six weeks, then had three weeks off, and so on, and this section facilitated that reporting. FRs seemed to have no difficulty transcribing the data from individual jobs into the employment summary, and when they read back this summary to respondents, sometimes respondents would be reminded of a spell of employment or unemployment and would correct the record.

With regard to reporting pay rate, FRs complained that the EHC lacked the standard CPS question asking respondents for the “easiest way” for them to report earnings, and this ambiguity often caused confusion (especially among respondents who expected this kind of structure). For example, respondents would ask, “Well, how do you want it -- hourly, annual...” FRs felt in the end they got good data; it was just a bit more work to get there.

And, although the EHC only requested the amount earned as of the end of the interview reference period (or the end of the job, if that was earlier), some respondents had trouble reporting their pay because it varied so much. FRs said they would ask for an average in these cases, or an amount “per job.” One respondent’s situation was especially challenging. She had worked for three hospitals over the course of the year, sometimes consecutively, sometimes concurrently, and sometimes not at all. The respondent could remember the last month or so but beyond that could not say with much confidence what she had earned. She had maintained a calendar to track this but had thrown it away.

5. Workers Insurance Programs

In this section respondents were asked about month-by-month dollar amounts received through various programs (e.g., unemployment payments). This is the first time in the survey that monthly dollar amounts are mentioned, and FRs were probed about any challenges in going from a 4-month to a 1-year reference period with regard to reporting specific amounts. Some FRs seemed to think an annual reference period was actually better because respondents often think about money on an annual basis (in part due to tax filings), so it’s less work for them to report at an annual level than a shorter time frame. In general they thought that some respondents could recall amounts fairly well, and others had to guess or estimate. Others would often respond, “Whatever I said last time” because they had no better indicator to go by. With regard to unemployment, FRs seemed to think that respondents did have specific periods of the calendar year in mind, but that amounts did not vary within a spell. FRs did have to be mindful to probe whether amounts were per week or per two weeks.

FRs also mentioned some issues not specific to the calendar, such as the notion that some low income respondents may report less income than they actually make because they’re afraid of losing their benefits, and that with direct deposit some respondents are even less knowledgeable about amounts, and say “I don’t know -- it goes straight to the bank.” Additionally, some respondents asked whether we wanted to know about retirement income.

FRs also noted an error in one of the skip patterns in “Unemployment” that caused them to skip the question on disability.

6. Social Security and Welfare

These sections ask about monthly dollar amounts received through Social Security and various welfare programs (e.g., Food Stamps). Though they interviewed relatively few respondents who were receiving welfare-type benefits, for the most part FRs seemed to think the calendar did a good job of picking up dollar amounts received and the timing of any fluctuations. Often times the dollar amount remained the same all year but when there were adjustments (e.g.: in Food Stamps and TANF benefits), respondents seemed able to recall. For example, one FR noted a respondent who said, “They cut me \$10,” and another respondent reported receiving a check for \$700 for just one month (the FR questioned this high amount but the respondent seemed certain). Often these changes in benefits were a result of changes in the household composition. For example, one respondent lost her WIC benefits when her child became too old for eligibility. FRs did say the calendar could be improved by finding a way to display the household roster to facilitate reporting of receipt for other beneficiaries.

FRs also noted some issues not specific to the calendar. For example, social security and SSI are fairly static, except for an annual raise, and they suggested this topic need not be asked about on a monthly basis. FRs also noted that “nobody knows how much Medicare takes out; it’s just gone at the beginning of the year” and suggested dropping the question since it’s not getting valid information. They also noted that in some cases the government pays the Medicare premium. One FR interviewed a respondent whose mother (who lives outside the household) took care of all the finances, thus the respondent could not answer any questions on specific amounts. And finally, FRs commented that for many respondents, these benefits are vital so they know fairly well what they receive (in both the regular SIPP and the EHC).

7. Health Insurance

This section asks whether household members had any kind of health insurance or coverage and, if so, the type of coverage (e.g.: employer-sponsored, Medicaid). The structure of this section was a departure from the rest of the EHC, and some FRs had trouble following the skip patterns in the questionnaire portion (below the calendar). However, they said once they got used to the flow it went ok, and most FRs said the goal of the section was made clear in training: to probe respondents about each of the six types of insurance listed in the calendar. Some FRs would start by asking if the respondent had any health insurance and, if yes, they would go down the list of plan types rather than follow the scripted questions and skip patterns. FRs noted that even when the respondent reported a particular type of coverage (e.g.: employer-based or Medicare), they would still go down the list and probe for the other types as well. One FR said a respondent said no to any coverage but mentioned several times that he had served in the military, and when the FR asked specifically about military or VA coverage the respondent said, “Oh yeah!”

Similar to comments on the labor force and employment summary sections, FRs noted that the rows for plan types followed by the row for uninsured worked well together, especially for respondents who had on-and-off coverage. For example, one FR talked about a respondent who

had COBRA coverage, and she was able to probe using start and end dates of jobs, and to probe for periods of non-coverage. Some FRs also noted that by the time this section was asked, they'd already gathered information on whether the respondent was employed, receiving benefits, and so on, which made it easier to know how to probe for changes in health insurance.

With regard to state-specific names for Medicaid and SCHIP, FRs reported that some respondents used state-specific names exclusively. For example, one respondent said her child was on KidCare (the name for SCHIP in Illinois) and wasn't aware of the generic SCHIP or Medicaid names. And as expected, FRs reported some general confusion among respondents regarding coverage (not related to the calendar). For example, some respondents reported their employer-sponsored coverage, but when later prompted about directly-purchased coverage they would say yes and explain that part of the premium was taken out of their paycheck. FRs would have to probe to determine whether this was the same plan as the employer-sponsored plan, or whether it was truly a second directly-purchased plan.

C. FEATURES of the EHC

1. Strategy of Asking “Now” First and Then Asking About 2007

The EHC was structured such that FRs first established the respondent's situation at present (e.g., being enrolled in school, working at a job) and then asked when that current situation started, and what the situation was prior to that. FRs were slightly mixed in their reactions to the strategy of starting with “now” and then moving back through the calendar year. For many respondents, it wasn't really an issue because their current state (e.g., working for employer X) had been the same for the past several years, so the focus on time period wasn't too important. But several FRs were quite positive about the strategy in general. Most seemed to think the approach in general was easy for respondents, making comments such as:

- “They know what's going on now so that's going to be fresh”
- “You start from where you are and work back...psychologically it's an easier route”
- “I think respondents liked talking about now, and then 2007...they preferred that quickness”; and
- “Definitely current to past triggered something with respondents, but it depends on the respondent”.

And some FRs thought the strategy worked particularly well in the residence and social welfare sections. One FR gave an example of a respondent who moved in November 2007 and before that lived with her mother for three months, and the EHC strategy helped her map this out. Another FR said the approach worked well for a respondent who was currently receiving food stamps and had been in 2007 as well. And finally, some FRs felt that knowing the respondents' situation at present helped them (FRs) understand where the respondent had been in the past, noting: “If we know what they're getting now and start backing up it helps us know what's going on....it worked really well.”

Once the respondent's current situation was established, FRs used a variety of strategies to ask about the past. Some just asked, “And did you receive X at any time in 2007?” or “When did you receive it in 2007?” Some asked how long the current spell had lasted, and whether there was

anything before that. Another FR said she started by asking “When did that start?” but then realized fairly quickly that respondents were taking a lot of time and effort to remember details that didn’t matter (i.e., a start date that was in the far distant past, such as when they moved in to their current residence back in 1992). So she shifted to a strategy of asking “Was that continuous through 2007?” And some respondents said they would let the conversation go with just one or two prompts, and often respondents would offer their own narrative, explaining a sequence of events over time.

Some FRs were not so positive about the general approach. Some were bothered by the notion of collecting data about “now” (and in many cases the first few months of 2008) when in fact we don’t need those data for analysis. And one FR pointed out that sometimes a respondent was receiving X now but it had just started a few weeks prior (i.e., not in 2007) so its usefulness was questionable. Another FR was concerned about the fact that we start off asking respondents about landmarks in 2007, then move to questions about the present, and then move back in time to 2007 again. She thought this back-and-forth confused respondents, and that it might improve the flow to start with 2007 and move forward in time.

2. Four-month versus One-year Reference Period

One of the most significant differences between the conventional SIPP and the EHC is the reference period; the former asks questions about the past four months, while the EHC asks questions about the past 16-18 months (beginning in January, 2007 up through the date of interview, which was sometime between April and June of 2008). FRs said they sometimes had to remind respondents that the EHC survey covered the whole of last year, not just the last 4 months, because respondents were accustomed to having to remember events only from the last few months. Of those respondents who said it was harder to remember a whole year versus 4 months, FRs said they did seem to struggle with the months further back in time. And some FRs felt that some respondents who didn’t have trouble with recall may not have been trying very hard because they didn’t care much about being accurate. An FR gave an example of a couple who owned several different businesses and said some may have made money, some may have lost money, and they just gave their best estimate. On the whole, FRs seemed to think the EHC was still getting fairly good data but that it was still easier to remember four months than a year. They also noted that a year is a long time for respondents to drum up all their financial information, and that once all the topics in the regular SIPP were incorporated in an EHC, it could take a substantial amount of time to cover such a long time span. On the other hand, some FRs felt that by the 9th or 10th wave, respondents were so tired of being in the survey that they just said nothing had changed simply to speed up the interview and get off the phone, thereby jeopardizing data quality. Going to a once-a-year data collection, they said, could result in more complete and accurate data since “respondents won’t be so disgusted with us.”

3. Narrowing Down Dates

FRs were trained to accept specific dates if offered and otherwise to probe for a specific month (with the exception of the labor force sections, where month-thirds were requested). FRs seemed to grasp the concepts as discussed in training – that is, if a specific date was offered they would record it, if no specific date was mentioned they would probe for beginning/middle/end of the

month, and if a month was not reported they would try to narrow it down by starting off with a probe, such as seasons of the year.

4. Visually Following Along as Calendar is Filled Out

Interviewers were not specifically trained to encourage the respondent to follow along visually as the calendar was being filled out; this was left to the FRs' discretion. FRs reported that most respondents thought the process was interesting, and some followed along as the form was being filled out and could see gaps (e.g., in employment). A few respondents would initially say there hadn't been any changes, but once the events were mapped out on the calendar they would say, "Oh yeah there was a change." In some cases it was not feasible for the FR to arrange the seating such that the respondent could see the calendar very clearly.

5. Sequence of Domains

While FRs were aware that the instrument allowed for flexibility regarding the order of the domains, most just went through the calendar in the default order of topics because it flowed well and there was usually not much reason to switch the order around. FRs did not remark on the logic of the default order -- that is, that easier-to-remember events were asked about first, followed by more difficult-to-remember topics, in the expectation that the easily-recalled events (e.g., residence, school) could assist with recall of later events.

6. Verbatim versus Unscripted Questions

In the EHC some items were to be read verbatim; generally these were the introductory questions in a given domain (e.g., "When did you move into this current residence?" and "Do you receive Social Security retirement now?"). Other questions were less scripted, and the EHC provided only prompts (e.g., "When start?" "Continuous?"). In these cases FRs were meant to improvise their particular wording (e.g., "When did that job start?"). Experienced FRs said the shift away from the verbatim approach was very unfamiliar, as both they and the respondents were used to a more structured approach, but most FRs said they got used to the EHC approach fairly quickly and strongly preferred it. They felt it improved rapport to not have to be so rigid and "non-human," and they also felt they could be more relaxed and had more leeway to clarify issues if the respondent didn't understand something. Most did not feel "lost" without a script and said it was not too difficult to switch back-and-forth between reading the domain narratives verbatim but then asking about spells and dollar amounts in a less structured way. New FRs seemed to have no particular difficulty picking up on the more conversational interviewing style. However, some FRs felt that the training did not emphasize the non-structured approach enough.

FRs said respondents seemed to prefer the more conversational style as well, as it helped them feel more part of the conversation; they seemed more engaged and less bored. One aspect of this engagement is that in the regular SIPP respondents often know what questions are coming next since they've been conditioned over the years, so sometimes the actual reading of the question is irrelevant. In the EHC, however, respondent don't necessarily know what will be asked next, so the question-asking process seems more engaging and less redundant.

Some experienced FRs did express concern about the lack of standardization, noting that if each FR asks their own version of the question, respondents are not necessarily hearing the same question. Some FRs also felt that verbatim reading came across as more professional than a less structured script.

Appendix A

Field Representative Focus Group Talking Points

Re-Engineered Survey of Income and Program Participation Field Test

May 6, 2008

- I. Agenda and initial feedback
 - A. Go over the agenda for the focus group
 - B. Take any suggestions for modifying the agenda, in case the agenda missed some major issues that came up in the field
 - C. Hold a short open session to raise any major common problems
- II. Usability: discuss how easy or difficult it was to perform each of these tasks:
 - A. Gaining Cooperation
 1. Explaining the purpose of the study
 2. Convincing the respondent to participate
 3. Any special challenges for Rs who already participated in production SIPP (ie: why are you back?)
 4. Rs new to SIPP – confused by advance letter?
 5. Role of the debit card – when used and why; was it effective
 - B. Control Card
 1. Listing household members (Section 1)
 2. Collecting demographics for all household members using some scripted questions (Section 2)
 3. Determining whether a spouse or parent lived in the household (Section 3); did R ask these questions or was it obvious and they just filled it in
 4. Completing Section 4 (number of people 15+, line number of R, etc)
 - C. EHC
 1. Topic areas (or “domains”): determining which topic area to start with and which to go to next
 2. Questions:
 - a. Locating the question text (or guide for a question) that needed to be asked
 - b. Determining which questions were to be read verbatim and which could be asked in your own words
 - c. Determining which question to ask next
 3. Recording answers:
 - For time period (months, or third-months, or dates): could Rs give this level of detail? Was it clear how to mark, esp if R gave answer that cut across 2 boxes (eg: 2nd week of April)
 - For other details (e.g.: address, hours worked/week, amounts)

received)

III. Respondent's interaction with the EHC

A. General

1. Did respondents seem to enjoy using the EHC?
2. How often/to what extent did respondents visually follow along as you filled out the EHC?

B. Navigation

1. Did the approach of asking about 'now' first as an anchor, and then asking about 2007, seem effective? Or was it an impediment to accurate recall of 2007 events?
2. After asking 'now' how did you proceed – asking 'when start?', or 'was it continuous thru 2007?', or 'what months in 2007?' or something else?
3. Did respondents seem to have a preference for working forwards or backwards in time when using the calendar, or does it not seem to matter? [if so: Does there seem to be a common tendency? Which direction do they prefer to go?]
4. Did respondents seem to have a preference in terms of order of topic area/domain? [if so: Is there a common preference for which topic to start with? If so, what?]

C. Landmarks

1. Did Rs seem to think this was odd or difficult, or did they come up with reasonable life events?
2. Did these life events later help them recall dates accurately?
3. How did you decide whether and when to prompt the respondent with "landmark" events – that is, reminding them of when a certain life event occurred (e.g: starting school) that might help them recall the date of another life event (e.g.: moving to a new residence)?
4. Did respondents often spontaneously refer to these events when they were trying to remember the dates of certain life events?
5. Were there specific events that trigger the recall of other events?
6. Was it helpful that the interview was fairly loose, leaving the use of landmark events to your judgement, or would you like more structure built into the calendar?

D. Accuracy

1. Did the EHC seem to help respondents recall events they otherwise would not have reported?
2. Did the EHC seem to help respondents narrow down dates they otherwise might not have been able to do?
3. Did respondents go back and change their answers if they realized a mistake was made?
4. Dollar amounts for programs: did this seem like a sensitive topic for Rs?

Did their answers seem accurate, or like guesses?

IV. Training

A. Please comment on how well the training prepared you in the following areas:

1. Learning curve: did you feel well-prepared from the start, or did it take a few interviews under your belt to feel like you understood how to conduct the iw
2. Navigation: determining where to start and how to flow through the instrument
3. Questions: identifying question wording and determining which to ask next
4. Landmarks: knowing how and when to use landmarks

Content: understanding the concepts in the calendar (e.g.: the workers insurance and social welfare programs, health insurance plan types, what “counts” as a job, etc.)

B. Please comment on the strengths and weaknesses of the components of training:

1. Classroom lecture
2. Field Representative manual
3. Demonstration scenarios
4. Paired practice scenarios

V. Overall (for experienced SIPP Frs)

A. Did the EHC method seem superior to the traditional SIPP in any way? If yes, how?

B. Does a once/year visit seem sufficient to capture events as far back as the early part of the calendar year, or do the four-month visits seem better for capturing that data?

VI. [if time] Common problems and issues to keep in mind in development of automated instrument