

1981

Help Yourself to Health: Interviewers' Training Manual

Center for Public Affairs Research (CPAR)
University of Nebraska at Omaha

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**Interviewers'
Training
Manual**

HELP YOURSELF TO HEALTH
INTERVIEWER'S TRAINING MANUAL

SUMMARY

Never do any of the following:

- 1. Never interview more than one person in the same family or the same housing unit. Members of one family are likely to share the same opinions on many subjects, and the sample calls for the diverse opinions of the community.
- 2. Never interview people other than those assigned.
- 3. Never interview by telephone. The subtleties of questions intended for a personal interview cannot be conveyed over the phone. Too, respondents find it easier to hang up than to refuse the interviewer at the door.
- 4. Never take a friend or anyone else along when you do interviewing. Go alone. Respondents will be more inhibited in the presence of "extra" interviewers.
- 5. Never allow anyone other than the designated respondent to answer your questions. Seek privacy. If others must be present and they start talking, or if the respondent asks for their opinions, tell him/her only his/her opinions are important. Gently but firmly instruct family members not to interrupt.
- 6. Never let someone else do the work for you. Substitutes are worthless, since you are the trained interviewer. If you cannot complete the work yourself, notify the study director at once.
- 7. Never reveal the details of your job or of specific interviews to others. The information you obtain is confidential, and you must respect this.
- 8. Never correct errors on someone else's advice. Instead, tell the director about your difficulties.
- 9. Never falsify interviews. All work is carefully examined, and methods of detecting false information have been devised. It isn't worth the trouble to do the job poorly or wrong.

Always do each of the following:

- 1. Always follow instructions carefully.
- 2. Always study the questionnaire until you are familiar with all the questions.
- 3. Always use the brief introductory approach written into the questionnaire.
- 4. Always be completely neutral, informal, conscientious.
- 5. Always read questions just as they are written.
- 6. Always ask all of the questions.
- 7. Always ask questions in the order they appear.
- 8. Always record comments accurately.
- 9. Always interview only the proper person at the housing unit designated by your procedure.
- 10. Always check each questionnaire to make sure you have completed every item.

For the next hour I will exist but not live; speak a little but say nothing; listen much but respond little; feel pain but not cry; feel rage but not explode; feel mirth but laugh only politely.....



INTRODUCTION

The role of the research interviewer

The role of the interviewer is very important in social research. No matter how much money a survey costs or how sophisticated the computer system is, if the interviewer is not good, the data will not be good. The interviewer is the key to good data.

The role of interviewer-respondent

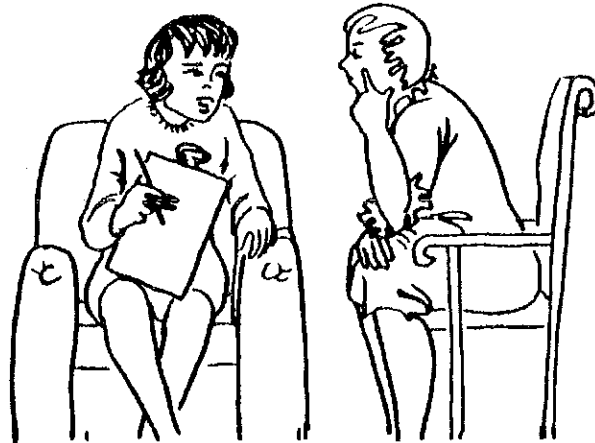
When people answer a knock on their front door, what do they expect? If they know the person knocking, they have to understand their own role as well as the other person's. If it is a child's teacher, the priest, a friend, the nasty man down the street, a relation, etc., the roles are clear.

If a stranger knocks at the door, people have an expectation based on their previous experience of strangers at the door. The welfare worker, a policeman, a door-to-door salesman may initiate a negative expectation.

The interviewer is neither friend/acquaintance nor negative stranger. The interview situation is one in which the respondent has little previous experience. The interviewer must guide the situation so that valid data can be gathered.

This means that the interviewer must:

1. dress conservatively or to appeal to the respondent group
2. be friendly but not get involved



I can't resist telling you-my grandmother was a Kowalski, too...

3. be professional and not make promises
4. probe for answers without getting into conflict



Why do I think that? BECAUSE! BECAUSE! BECAUSE!

5. be completely neutral on the content of the interview
6. be tactful and make the respondent feel comfortable,

YOUR IMAGE IS IMPORTANT

- YOUR APPEARANCE

Be neat and clean.
Wear clothes that are in good repair.
Wear comfortable shoes.

- YOUR EQUIPMENT

Carry all necessary materials in your folder.
Do not carry extra items.
Always wear your name badge.

- YOUR MANNER

Be polite and friendly.
Don't smoke.
Don't chew gum.
Don't take food or drink with you to the door.

REMEMBER THIS IS A JOB!

The rest of these instructions include some specific techniques. Read them carefully at home. Practice the interview several times to become familiar with it.

BE THOROUGHLY PREPARED

The main reason survey research organizations are able to collect useful data is that interviewers can and do assure their respondents that their replies will be completely confidential. IT IS YOUR RESPONSIBILITY AS AN INTERVIEWER TO KEEP THAT PROMISE.

These rules apply to the opinions you hear, and the information you receive, no matter what the subject. There can be no exceptions to CONFIDENTIALITY!

SETTING THE STAGE FOR GOOD INTERVIEWING RELATIONS

Controlling the conditions under which an interview is conducted is just as important as the way the interviewer does the other phases of his/her job.

If at all possible conduct the interview:

- inside respondent's home with both parties comfortably seated.
- with no other persons present except the interviewer and the respondent.

Get inside the house or apartment and sit down before you really get into the interview. If there seems to be some legitimate reason for not letting you inside, don't press the issue and do your interview on the stairs or in the yard, or wherever.

Try something like:

"Why don't we go inside and sit down--I don't want to keep you standing too long."

Avoid an "audience." An interview conducted in full hearing of a roomful of people may prove worthless.

POSSIBLE SITUATIONS

Situation

Response

Others are present when you arrive

"Could we sit in the kitchen or dining room so we don't disturb others?"

or

"I wonder if we could sit in the dining room. We aren't allowed to interview unless it can be done privately."

The respondent is alone when you arrive

"I'm glad to see that nobody else is around. We're not allowed to interview with somebody else sitting in."

A third person tries to "horn in"

Make it clear that you can talk with only one person.

"I'm sorry, but this is supposed to be a confidential interview. Do you mind if (the respondent) gives me his/her ideas in private now? You can talk it over with him/her later."

ESTABLISHING AND MAINTAINING GOOD INTERVIEWING RELATIONS

Good interviewing relations exist when the respondent feels relaxed and at ease with the interviewer to the point where he/she feels free to say what he/she really thinks or feels about a given subject, without fear of criticism or disapproval.

Generally, the approach to the respondent previously described is all that is needed to get the interview under way, and your conduct and bearing in the course of the interview will provide all the encouragement needed to talk comfortably and freely. So, remember these essential points:

- Be friendly and informal but, at the same time, professional in your manner. Remember that you are a stranger. YOU MUST GAIN THE RESPONDENT'S CONFIDENCE.
- Be a sympathetic, interested, and attentive listener.

Try:

- encouraging nods
- smiles
- "uh - huh's."

But: Don't overdo it!

- Be neutral with respect to the subject matter.

Try:

- "I see"
- "I understand"
- "O.K."

Don't:

- express your own opinions
- react emotionally to responses.

- Be observant. Watch for the way in which the respondent answers.
- Be at ease.
- Be familiar with the instructions.
- Practice the interview at home first.

REMEMBER YOU ARE A PROFESSIONAL INTERVIEWER

BEGINNING THE INTERVIEW

INTRODUCING YOURSELF

Always introduce yourself in the shortest possible way. Usually, the less explanation you give, the better. So, just give the introduction from the first page of the interview.

Hello, I'm _____
from the Center for Applied Urban Research at the University of Nebraska at Omaha. We are doing a survey to find out about what medical services and doctors you usually use and what you think about them, and what you would like different, if anything.

A lot of people in this area are interested in knowing how you feel about your health care. Are you interested in knowing about the survey and some of the people who are supporting it?

POSSIBLE SITUATIONS

Situation

Response

The respondent asks how long the interview will last

GIVE VAGUE RESPONSES

"That's hard to say: it varies from person to person."

or

Give an estimate of minimum expected time.

The respondent asks how or why they were chosen

EXPLAIN

"This address was chosen at random."

or

"Interviewees were chosen by address."

or

"The project director tells us which houses to go to."

or

"The computer kicked out this address by chance. We didn't know who lived here."

The respondent asks what the interview is for

EXPLAIN

Use the purpose of the interview from the introduction.

POSSIBLE SITUATIONS

Situation

Response

Respondent is embarrassed by an unflattering situation; e.g., the house is messy

UNDERSTAND AND SYMPATHIZE

"I know how hard it is to keep a house clean with children around,

or

"Dust is certainly a problem in this dry weather."

Respondent is not completely dressed or just got out of the shower

Say you'll wait for them.

or

Make an appointment to come back.

Respondent is irritated at the interruption

UNDERSTAND SITUATION AND OFFER ALTERNATIVES

Let respondent finish duties if they won't take too long.

or

Let respondent continue duties such as cooking, ironing, washing car.

or

If duties are incompatible with interview, ask respondent to postpone them until after interview.

or

Make appointment to come back.

Respondent is ill at ease with a stranger

LIGHTEN UP THE ATMOSPHERE

Be friendly.

Make casual remarks about children or pets
furniture
weather.

Respondent is fearful about exposing ignorance

REASSURE RESPONDENT

Explain that this is not a test.

or

"There are no right or wrong answers."

or

"Your opinions are important."

MORE POSSIBLE SITUATIONS

Situation

Response

Respondent is suspicious about what will be done with answers

REMIND RESPONDENT

"The survey is confidential."

or

"No one will know who you are."

or

"No one will know exactly what you said."

or

"There are many respondents in this study."

or

Review the purpose of the study from the introduction.

or

Show flyer again.

Respondent wants to know what you think

REMAIN NEUTRAL

"What I think doesn't matter."

or

"I'm interested in what you think."

or

"I don't live around here, so I'm not in a position to know."

ASKING THE QUESTIONS

GENERAL PRINCIPLES

The study director must be sure that any differences he/she finds in the data collected are differences among respondents and not differences among interviewers. Make certain that questions are always asked in the same OBJECTIVE fashion.

The order in which questions are asked can easily influence the replies. Always follow the order and the directions in the questionnaire.

SPECIFIC TECHNIQUES

Follow these rules:

Read each question exactly as worded on the questionnaire. Do not trust your memory. All respondents must be asked the questions in identical form. Small, minor changes can affect the meaning of the question.

Read the questions naturally. Be thoroughly familiar with the questionnaire so that you can read each question without hesitation or stumbling.

- Practice at home first,
- Read and understand instructions,
- Do not read instructions (information in boxes) to the respondent.

Don't attempt to explain the questions. If the respondent does not seem to understand a question, repeat the question slowly and clearly. Give the respondent time to consider the meaning of the question. Do not elaborate.

NEVER EXPLAIN THE MEANING OF A QUESTION UNLESS THE SPECIFICATIONS PERMIT YOU TO DO SO.

Ask every question. Never omit a question because you think it does not apply or because you think it has already been answered, unless the instructions say to do so.

Ask all questions in the order in which they appear on the questionnaire. Never change the sequence of a question.

Factual questions -- Most of the questions used in this interview are factual questions. In dealing with factual material, the interviewer is expected to LISTEN CAREFULLY, to note contradictions, to probe tactfully, and to go back whenever necessary and change whatever facts were incorrectly reported.

For example, answers should be consistent for question 3 which asks "How long ago did (respondent) have an examination, or check up or was seen by a doctor?" Question number 30 asks "Since the first of the year, who in the family has gone to the hospital, clinic, or doctor's office?"

Watch for sub-questions. Sub-questions are the types of questions which follow specified answers to the previous question. For example, if the respondent says "yes" to a question, you may be instructed to follow this response by skipping some questions. If the respondent answers "no," you may be instructed to ask sub-questions.

DO NOT OMIT THE APPROPRIATE SUB-QUESTION. DO NOT ASK THE WRONG SUB-QUESTION OR ASK ONE WHEN IT IS NOT REQUIRED.

OBTAINING RESPONSES

GENERAL PRINCIPLES

The main task in interviewing is to obtain data which are clear and complete.

Before you leave a question for the next ask yourself -
"Do I understand?"

SPECIFIC TECHNIQUES

Open-ended questions

- Write down exactly what the respondent says.

If you don't understand say,

"Would you please repeat that?"

If answers are vague or "Don't Know", use NEUTRAL PROBES:

Could you explain that?

Would you estimate...

In your opinion...

What do you think?

Pre-coded questions

- Circle code which corresponds to question # 14 -

"How does (person) usually get there?"

1. own car
2. some else's car
3. taxi
4. bus
5. walks
6. other

POSSIBLE SITUATIONS

Situation

Response

The answer given is not one of the possible answers on the questionnaire

Repeat the possible answers.

or

Repeat key phrases or words in the question such as, "usually," "most recent," "most often."

Respondent feels that none of the categories fits

Write the answer but not the code.

Respondent amplifies or defends the choice

Write comments next to answer chosen.

MORE POSSIBLE SITUATIONS

Situation

Respondent is suspicious about what will be done with answers

Response

REMIND RESPONDENT

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"No one will know who you are."

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RECORDING RESPONSES

GENERAL PRINCIPLES

a. Be ready to write. Have your pencil poised--ready to write--when you ask your question.

b. Circle codes carefully. Throughout the questionnaires when you circle a code, be sure that it's obvious which code is circled.

c. Circle one code per question unless instructed otherwise.

d. Take the time to edit each questionnaire right after you complete the interview, before you conduct another. In particular:

- (1) Make sure you've recorded an answer for every question that applies.
- (2) Make sure everything you've written is legible.
- (3) Write anything about the manner, reactions, and gestures of the respondent that may have a bearing on his answers.
- (4) Report anything about the interviewing situation--the presence of others, uncomfortable location, etc.--which may affect the interpretation of this interview.

And, of course, add anything else that you feel will prove helpful in analyzing the interview.