Management of CAPI and CATI at the Labor Force Survey

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Outline

- LFS - Data collection methods
- The computerized data collection system
- Data collection procedure
- Transition to a new procedure
- Summary and conclusion
- Future plans
LFS – Data collection methods

- A quarterly panel survey
- 12,000 dwellings sampled each year
- 4 investigations for each panel:
  - Wave 1 - *CAPI* interview
  - Wave 2 - *CATI* interview
  - Wave 3 - *CATI* interview
  - Wave 4 - *CAPI* interview
LFS – Data collection methods (Contd.)

- All four investigations are conducted in parallel every quarter
- The survey is carried out every week, continuously, for the entire three months of the survey
- The investigation period for each case is one predetermined week, plus 3 weeks for unresolved cases
Facilities of the computerized data collection

- Questionnaire - Blaise 4.6
- The interviewer's management - Maniplus
- The supervisor’s management system - .Net
- The overall management - .Net
- CATI Management - Blaise CATI Management
- The questionnaire’s data is stored in the Blaise database, and the survey management data is stored in an SQL2005 server
The main functions of the computerized data collection system

- Assignment of cases to CAPI or CATI
- Transmission of data
- Keeping track of non-response cases
- Moving cases from CAPI to CATI and vice versa
- Managing the response status for each case
- Producing follow-up reports
The need for a multi-mode method
between waves

- Face to Face interview in the 1st wave:
- Correct identification of the dwelling
- Exclusion of ineligible cases
- Finding solutions for tracing problems
- The need to verify personal demographic data
- Reducing refusals
- Developing rapport with respondents
The need for a multi-mode method between waves (Contd.)

**Face to Face interview in the 4th wave:**
This wave includes a supplementary income survey and requires the respondent to present various documents such as salary slips.

**Telephone interviewing in the 2nd and 3rd waves**
Reduction of costs
The need for a multi-mode method within waves

1\textsuperscript{st} and 4\textsuperscript{th} waves are mainly face-to-face interviews:

In case of

- Lack of time
- Remote places
- Shortage of interviewers

Switch to Telephone interview

2\textsuperscript{nd} and 3\textsuperscript{rd} waves are mainly telephone interviews:

In case of

- No telephone no

Switch to Face to face interview
Data collection procedure – First wave

Before transition

1. Assignment of cases to three regional centers
2. CAPI supervisor assigns cases to interviewer
3. CAPI interviewer makes personal visits
4. Data of visits is recorded in the questionnaire
5. CAPI interviewer transmits data each night
6. Supervisor authorizes contact by phone
Why change procedure?

- Limited time for field interviewer
- Administrative details are less reliable
- Not possible to monitor the interviews in real time
- The use of the management system
Data collection procedures – First wave

Before transition
1. Assignment of cases to three regional centers
2. CAPI supervisor assigns cases to interviewer
3. CAPI interviewer makes personal visits
4. Data of visits is recorded in the questionnaire
5. CAPI interviewer transmits data each night
6. Supervisor authorizes contact by phone

After transition
1-5 Same as before
6. The CAPI supervisor verifies the existence of a valid telephone number
7. The CAPI supervisor indicates the case as suitable to move to CATI
8. The overall management system creates new questionnaires
9. The new questionnaires are included in the "day batch"
Advantages of the new procedure

- The investigations are conducted from one central collection center
- The interviewers use an automatic call scheduler
- Assigning special cases to appropriate interviewers
- Monitoring by supervisors online
- The CATI management system tracks administrative information
Disadvantages of the new procedure

- The responsibility for some of the cases is divided between CAPI interviewers and CATI interviewers
- Insufficient information from CAPI interviewers
Special considerations

- Keeping detailed information provided by CAPI interviewers
- Presenting CAPI recorded information in CATI investigation
- Time table considerations
- Determining final status
- Developing monitoring tools
Summary and conclusions

- The new procedure is advantageous
- The overall management system allows the implementation of the change
- The transition has been successful
- Encountered problems of staff adjustment and flow of information
Future plans

Making improvements

☆ Training for the new procedure to overcome adjustment problems

☆ Better ways to use information

Towards moving to monthly survey 2012:

☆ Change to monthly survey using Blaise 4.8

☆ Employing the new procedure in first wave
THE END

Thank you