RETAINING GOOD INTERVIEWERS:
CHARACTERISTICS THAT AFFECT INTERVIEWER TURNOVER AND RETENTION IN A CAPI SURVEY

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Abstract
Computer-assisted personal interviewing (CAPI) studies often incur higher training costs due to the additional training required to master study hardware and software. As training costs increase, so does attention to interviewer retention rates. In order to better manage project resources, organizations must understand the factors that influence interviewer turnover.

The Medicare Current Beneficiary Survey (MCBS) is a national, longitudinal study of the Medicare population. MCBS interviews over 50,000 beneficiaries per year, with a field staff of 225 interviewers. Over 500 interviewers have attended the project's 14-day training sessions. When the study began in 1991, MCBS experienced high interviewer retention rates. However, since 1998 less than one-half of the interviewers hired stayed with the survey for 1 year. Decreasing retention rates of trained interviewers led to an examination of which interviewer attributes can predict tenure.

Since its inception, MCBS has maintained an interviewer database of demographic, experiential, and attitudinal information on each person hired. Each interviewer who begins the study is asked to complete a questionnaire that measures interviewing and computer experience. When an interviewer leaves the project, the database is updated with the reason for departure.

To better understand the relationship between interviewer characteristics and retention, analyses of data on those who left the project and those who remain were conducted. The results indicate that retention does not increase with interviewer education, however it does increase with interviewer age. Interviewers residing in rural areas tend to stay with the project longer. And surprisingly, interviewers with the *least* amount of computer experience remain on this CAPI study the longest.

Introduction
MCBS is a national, longitudinal study of the Medicare population. It has been conducted continuously for the Health Care Financing Administration (HCFA) since 1991. Laschober and Olin (1996) described MCBS as "the only comprehensive source of information on the health, health care, and socioeconomic and demographic characteristics of aged, disabled, and institutionalized Medicare beneficiaries." Approximately 16,000 Beneficiaries are interviewed three times a year for 4 years in a rotating panel design. Each fall round about one-third of the sample is retired and approximately 6,000 new sample persons are added. Since its inception, MCBS has hired 539 individuals to interview on the study using a complex 60-minute CAPI instrument.

The problem of interviewer turnover is not new. But the increased costs of training field staff on complex CAPI studies has exacerbated the situation. Over 30 years ago the U.S. Census Bureau expressed concern regarding their interviewer turnover rate. Throughout the 1960s interviewer turnover for census programs averaged approximately 29 percent. The MCBS turnover rates throughout the 1990s averages 31 percent. Today, however, adding new staff is increasingly more expensive due to factors, including the difficulty of recruiting capable staff in a strong economy, the longer training sessions required to teach interviewers basic computer skills and CAPI navigation, and the additional requirement of maintaining a systems staff at training sessions. In 1965 the Census Bureau reported that the cost of recruiting and training a Current Population Survey interviewer was $770 (Inderfurth, 1972). Today MCBS pays approximately $5,000 to hire and train each new interviewer. While a complete and thorough training of all interviewers is required and is money well spent, loosing half of new staff within 12 months is simply not cost effective. What factors caused some interviewers to stay on the projects for years while others quickly left?

Background

Due to the study's design, MCBS can only train new interviewers once a year. Recruiting new interviewers taxes project resources. Recruiting begins in May and is completed by August. Areas that need additional staff are first identified, then field supervisors consult an internal database of experienced Westat interviewers and recent applicants. If no promising candidates are found, the project will then place ads in newspapers within each Primary Sampling Unit (PSU). Applicants are first screened by telephone for experience and availability. Successfully screened applicants are then interviewed inperson by two project staff, often the field supervisor and a quality control monitor. During the hour-long job interview applicants are given a short paper questionnaire to assess their verbal aptitude and their ability to follow simple directions. Applicants are also shown the CAPI laptop computer and are given the opportunity to acquaint themselves with the technology.

Interviewer Database – A Tool for Analysis

To identify which variables lead to retaining successful interviewers an analysis of the MCBS "Interviewer Database" was conducted. Each new hire is asked to complete a brief questionnaire prior to training. The questionnaire covers issues such as interviewing experience, familiarity with computers, and demographic items. Of the 539 people hired, 496 completed the questionnaire (92.0%). Further, when an interviewer leaves MCBS, a code indicating reason for release is assigned (see Table 1). A departure code has been assigned to all 347 interviewers who have left MCBS. By examining interviewer database variables along with reason for departure and length on project, some interesting patterns emerge.

Table 1 shows the main reasons why interviewers leave the project. Over one-third of interviewers released are let go due to poor performance, a code given to interviewers who work an insufficient number of hours. Almost another third of departing interviewers leave due to personal problems such as illness or moving their residence outside the PSU while 15% report that they have found a different job.

Table 1. Reasons for Leaving MCBS.

Reason for Leaving	Percent
Poor Performance	35%
Personal Problems/illness/moved	31%
Left for Another Job	15%
Study too Complex	10%
Dishonesty	5%
Retired/Deceased	4%

Results
Interviewer Attributes

Table 2 provides some demographics of those who left the study and confirms common survey operations wisdom.

- It is difficult to retain male interviewers. Sixty-one percent of male hires depart within 1 year compared to 41 percent of females.

- Older interviewers remain on the project longer. Sixty percent of younger people who leave the project do so within 1 year while only 41 percent of interviewers over 60 years old leave that soon.

- Interviewers from rural areas remain with the project the longest. Only 49 percent of urban interviewers remain on MCBS over one year compared to 72 percent of rural interviewers.

Table 2. How Demographics Impact Duration on the Project.

Duration on Project	0 to 4 Months	5 to 12 Months	13 to 24 Months	25 to 36 Months	Over 36 Months
Males (N=51)	37%	24%	23%	9%	6%
Females (N=262)	24	17	23	13	23
Age Less Than 40 Years (N=69)	30	30	15	16	10
Age More Than 60 Years (N=68)	25	16	18	15	27
Urban (N=117)	33	18	20	13	30
Rural (N=68)	15	13	32	13	27

Reasons for Attrition

Table 3 shows three patterns of interviewer attrition. Those who leave the project due to the study's complexity are fairly quickly identified and removed. Almost two-thirds of the people who find the project too complicated are gone within their first round. In contrast, low producers tend to remain on the project longer. This is due, in part, to the project's design in which hiring occurs only once a year. Low producers are retained longer because it takes time to locate and train replacements. Interestingly, the number of interviewers released because they have been dishonest with Westat remains fairly constant across years of service. While only 5 percent of released interviewers are let go due to dishonest acts, fully a quarter of those released due to dishonesty had been working for the company at least 3 years. This despite the fact that MCBS has a large number of quality assurance measures including validating cases by telephone, audiotaping specific interviews, and observing interviewers in the field. This pattern indicates that project staff should be constantly vigilant with even their most experienced staff.

Effect of Experience

Almost one-third of new hires who come to the project with no interviewing experience, leave within their first round, and only about a quarter of them are left after 1 year. By contrast, interviewers who have been in the business for many years tend to remain on the project for a longer time. Forty-four percent of released interviewers with over 6 years of interviewing experience remained on the project for more than 2 years.

Effect of Computer Familiarity

Since the beginning of this study, recruiters told prospective recruits that they do not require any computer experience. Applicants are informed that they will be trained on all the computer details they will need for the project. Although this is our recruiting strategy, we were surprised to learn that those hires with the least amount of computer experience stayed on the project the longest. Table 4 shows that those interviewers who report greater familiarity with computers tend to leave the soonest.

What Makes a Successful Interviewer?

To further distinguish interviewers who stayed with the project and those who left, all interviewers, regardless of their project status, were categorized into one of three groups: *successful, unsuccessful,* and *not yet known.* "Successful" (N=194) refers to those interviewers who worked on the project for at least 3 years. These individuals may now be released or currently working. "Unsuccessful" (N=249) refers to interviewers who worked fewer than three years on MCBS. Members of this group have all been released. "Not Yet Known" (N=53) are those recently hired interviewers who have not yet worked for 3 years, but they are still working on the project. They have the potential to become successful or unsuccessful.

Table 3. How Long Released Interviewers Work Before They Leave the Project.

Duration on Project	0 to 4 Months	5 to 12 Months	13 to 24 Months	25 to 36 Months	Over 36 Months
Study Too Complex (N=33)	64%	27%	6%	3%	0%
Poor Performance (N=199)	40	16	19	16	10
Dishonesty (N=16)	13	29	25	8	25

Table 4. New Hires Comfort with Computers.

Duration on Project	0 to 4 Months	5 to 12 Months	13 to 24 Months	25 to 36 Months	Over 36 Months
Very Comfortable (N=113)	31%	17%	29%	11%	12%
Somewhat Comfortable (N=81)	20	19	28	15	19
Little or No Experience (N=117)	25	19	13	14	30

Effect of Education

Table 5 shows that nearly 60 percent of interviewers who have a high school education are considered successful, while the majority of those interviewers with degrees work tend to be unsuccessful. Further, experience predicts success. Those interviewers who have been in the business for years are more likely to remain on the study.

Summary and Conclusions

Although our methods of collecting information are now much different than they were in the 1960s and the costs of recruiting and training interviewers is significantly higher, interviewer retention rates have changed very little in the past 40 years. This is a problem for both survey quality and costs since Apodaca, Williams, and Malloy (1995) found that interviewer's response rates tend to increase with project experience. While the move to CAPI has been the biggest change in the data collection process, we found that trainees less familiar with computers are in some respects better hires, as the remain on the project longer. A trainee's familiarity with computers seems to predict longevity in the *opposite* direction than expected. This was also found when we looked at education levels and found that formal education was more a predictor of longevity on the survey. It may be that those interviewers with greater computer skills and education find preferable work outside of survey research. Retaining those people is difficult now, and anecdotally at least, it may be getting worse. Further, we also found that interviewers in urban areas leave at a faster rate than those in rural areas, leading us to overhire by as much as 30 percent in cities. Finally we found that older interviewers remain on the project for longer periods.

REFERENCES

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Table 5. Traits of Successful Interviewers.

	Successful	Unsuccessful
Education		
High School Education (N=77)	57%	43%
Bachelor's or Greater (N=93)	43	57
Interviewing Experience		
No Interviewing Experience (N=120)	27	63
Five Years or Less Interviewing Experience (N=192)	41	59
More Than Five Years Experience (N=129)	55	45