

Using an Action-Research Model to Move from Conversational to Hybrid Standardized Interviewing: A Case Study

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Abstract

Logistical challenges and limited resources for field experimentation often stand as major impediments to testing improvements in survey methodology, but other approaches are available for introducing and evaluating change on a gradual basis. This case study describes how the principles of action research were used to introduce more standardized interviewing into a survey that had completely relied on a conversational interviewing approach for many years. The advantages and disadvantages of standardized vs. conversational interviewing are discussed in this context.

Key Words: Conversational interviewing, standardized interviewing, action research

1. Background

Since 1984, the Mass Layoff Statistics (MLS) program has been collecting reports on mass layoff actions that result in workers being separated from their jobs. Although this voluntary survey is managed by the Bureau of Labor Statistics (BLS), data collection is decentralized across the U.S. with interviews conducted by individuals, called State Analysts, who work in state labor offices. Calls to employers are triggered when at least 50 initial claims for unemployment insurance (UI) are filed against an establishment during a 5-week period. A mass layoff becomes an *extended* mass layoff when 50 or more workers are separated from their jobs for at least 31 days.

When an employer is called to verify that a layoff has occurred, approximately 15 questions are asked to obtain information about the total number of workers separated, the timing of the layoff, the primary economic reason for the layoff, the type of business function affected, worksite closures, recall expectations, and whether the layoff resulted in work being moved within the U.S., outside the U.S., or to a different company. State administrative records are used to obtain socioeconomic characteristics on unemployment insurance (UI) claimants such as gender, age, race, and residency. State Analysts are responsible for calling employers and collecting the data as part of a joint federal-state effort. Although not without advantages, this arrangement also poses special challenges because BLS managers are responsible for monitoring and coordinating data collection in 52 separate locations.

1.1 Conversational vs. Standardized Interviewing

A conversational interviewing approach has been used in the program since its inception. There are several reasons for this. First, calling an employer about a layoff can be a

highly stressful situation that requires flexibility on the interviewer's part. Many employers view the questions asked by the survey (for example, reason for a layoff, what will happen to the work affected by the layoff, where jobs end up) as extremely sensitive, proprietary information. Moreover, as one would expect, layoffs are often associated with stressful situations. Respondents are frequently under stress either because of the pressures of a layoff or because they are in the process of shutting down a business. State Analysts have argued that dealing with potentially uncooperative respondents in these types of situations requires the flexibility to obtain information using a loosely structured interviewing approach that gives them the autonomy necessary to respond to a wide variety of situations, emotions, and personalities.

Second, because seasonal layoffs are a recurring feature in some industries, State Analysts call some respondents on a fairly regular basis, get to know them quite well, and establish a warm relationship with them, so in these cases, using scripted interviews can sound overly formal and cold.

Third, business respondents run the gamut from no-nonsense types who want to provide the information as quickly as possible to others who prefer a more relaxed, chatty, friendly interviewing style. State Analysts believe that a conversational approach provides the flexibility necessary to establish and maintain rapport, and is well suited to a wide variety of situations. Since establishing and maintaining rapport is viewed as critical, especially when calling previously contacted employers, use of a standardized, scripted interview has always raised concerns because of fears that it could make an interviewer sound robotic and inattentive, and thereby lead to less cooperation and poorer data.

Despite strong justifications for the use of conversational interviewing, program management at BLS had several concerns about the conversational approach. First, in some states turnover among the State Analysts occurs relatively frequently. When the budget allows, BLS provides formal training, but it is not uncommon for new analysts to have their initial training delivered on the job by state personnel using BLS supplied materials. Although on-the-job training can be highly effective, it suffers from several potential drawbacks. Lack of training time is one possible constraint. Another is that as training is passed from one individual to another, it is not unusual for "procedure drift" to occur, idiosyncratic approaches might be introduced, or some topics might not receive adequate coverage. Also, because of varying workloads and local business conditions, staffing for the survey varies widely among states. Larger states might have a 6-person interviewing team working on the program, whereas small states might have one person assigned this responsibility on a part-time basis (some analysts perform a variety of tasks other than interviewing). As with any interviewing task, experience is an extremely important teacher, but such experience is unevenly distributed among the states.

Since all the data collected by the states is processed by BLS,¹ reviews of the data and questions asked by the State Analysts revealed differences in how procedures were being interpreted and implemented. For these reasons, the MLS program management made the decision to introduce more standardization into the interviewing process. The challenge was how to obtain the cooperation of the State Analysts (interviewers) and their managers.

¹ MLS interviews are almost all done on the phone using a paper form (data are rarely faxed in). After the interview, data are entered into a database for transmission to BLS.

1.2 Objectives of Standardized Interviewing

A primary objective of standardization is to control the interviewer as a source of error. The advantages and disadvantages of standardized versus non-standardized interviewing are summarized nicely by Beatty (1995) and Maynard and Schaeffer (2002). Although Hyman (1954) explored the effects of interviewer variation resulting from non-standardized behavior, little subsequent research appears to have been done that directly contrasts the use of standardized with non-standardized interviewing approaches in actual survey settings. Instead, the use of standardized interviewing seems to have become the norm in survey research because of the obvious practical advantages that it offers. For example, standardized interviewing reduces the job demands and amount of training required, it is less expensive (less skilled workers can be hired and paid at a lower rate), it results in faster training, and, probably most important, it has been judged effective by its practitioners. In addition, because the interview process is standardized, performance evaluation becomes more straightforward, so the manager's job is simplified.

To be clear what is meant by standardized interviewing, Fowler and Mangione (1990) recommend that interviewers read questions exactly as worded, use only nondirective probing, and maintain a neutral interviewing approach with no discretion involved in how answers are recorded. In addition, Fowler and Mangione call for practice-oriented training, systematic interview monitoring, and close supervision. Beatty (1995) goes on to add that "The goal of standardized survey interviewing is to obtain complete answers to questions uniformly administered and clearly understood." He states that the way to accomplish this is to systematically pretest questions to identify unclear terms or other sources of confusion, and to use cognitive interviewing to understand how respondents understand questions.

So how did interviewers who were used to conversational interviewing react when they were told that more standardization was going to be introduced? Most were not enthusiastic about the idea. Although BLS managers could have pressed the issue and required use of a completely scripted interview, there were several reasons why this course of action was not pursued. First, managers knew that a skilled core group of experienced interviewers existed who were getting the job done, and they did not want to antagonize them. Moreover, the managers acknowledged that these interviewers relied on a body of skills to negotiate and complete interviews that could not be captured in a standardized script (Maynard and Schaeffer, 2002). Second, because interviewing was completely decentralized without any direct BLS oversight, there was no way to provide systematic interview monitoring and close supervision. Given these constraints, a flexible, adaptive approach was chosen to broach the topic and gradually introduce more standardization into the interview process. The remainder of this paper describes the process that was used and the assessment steps that were taken.

2. The Implementation and Evaluation Approach

2.1 General Strategy

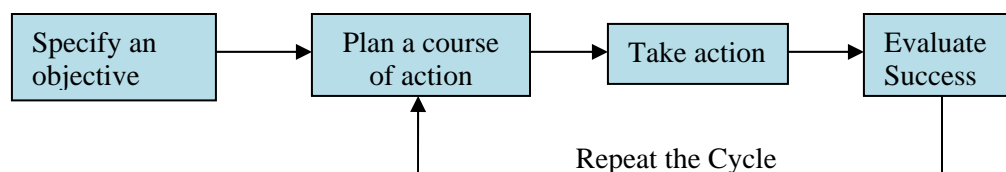
Since BLS management lacked the ability to closely supervise and directly monitor the data collection process, a key objective was to create positive attitudes toward, and general acceptance of, a more standardized approach to data collection. Rather than force an approach on analysts, which they could just ignore, the decision was made to involve

the states and State Analysts in the development process to increase the likelihood they would support the process and use the resulting tool. In addition, management made it clear from the start that the purpose of this process was not to turn the interviewer (State Analyst) into an interviewing automaton, but rather to provide a tool that would make the analyst's job easier and hopefully lead to higher quality data. In this context, the standardized script was to be viewed as a guide or job aid for the interviewer, but its use would be tempered by the analyst's judgment and commonsense. The general implementation strategy involved the following iterative steps:

- Introduce portions of a standardized interview.
- Conduct evaluations.
- Discuss results with participants.
- Identify new objectives (introduce more standardization or revisions)
- Conduct additional evaluations, etc.

This iterative development process has been referred to as “action research” (Lewin, 1946). Open, honest discussion was a critical part of each step of the implementation. Analyst feedback was always given serious consideration, and the entire effort was implemented as a team effort to improve survey quality. The general approach emphasized easing analysts into the use of a standardized interview, rather than introducing it “cold turkey.” Management wanted analysts to become familiar with the approach, experience associated benefits, accept the approach willingly, and possibly even develop a sense of ownership once they witnessed the beneficial impact of the approach on data quality.

2.2. The Action-Research Model



Why use this evaluation model versus a more controlled field study? A classic, experimental field study using the new approach was not feasible for several reasons. First, the largest states had at most six analysts, whereas others had one or two (or one part-timer). Therefore, it would have been impractical to attempt to randomly assign analysts to different treatment groups (and try to ensure they adhered to procedures), or to expect that they wouldn't share information had such assignments taken place. Second, depending on the economic activity in a state, the number and type of layoffs varied widely. Third, a more practical limiting factor was the budget. Money was simply not available to set up and run controlled experimental studies. And, fourth, new questions covering completely new concepts were introduced during the process of developing the standardized script. Attempting to control for this additional variable in field studies added additional complexity. Therefore, the evaluation process relied heavily on qualitative feedback from the analysts obtained through the use of questionnaires, group discussions, workshops, and feedback from an advisory council.

The iterative approach that was used stretched over approximately three years. The specific steps taken are described next.

2.3 Step 1 - Lay the Groundwork

The MLS program typically conducts a combined annual training conference for State Analysts and BLS regional office staff. Prior to the 2004 annual conference, a series of structured questions was developed to cover a new topic that was being added to the survey. MLS was asked to include new questions that measured the impact of offshoring and outsourcing on mass layoffs (these were called “movement-of-work” questions). Because of the extreme sensitivity of this topic (businesses were, and remain, heavily criticized for moving work overseas), a great deal of effort went into developing these questions and deciding where they should appear in the usual sequence of MLS questions. Because these questions were completely new and were viewed as both sensitive and complex, they offered an ideal starting point for introducing more standardization.

As an aside, to help manage the survey, BLS holds regular meetings of an advisory group consisting of representatives from six different states. As drafts of the movement-of-work questions were developed, they were reviewed and critiqued by questionnaire design experts within BLS and by the advisory group. In early 2004, several of the states used the questions on a trial basis for several months to see how they worked in the context of the existing MLS interview.

After the trial period, a questionnaire was sent to participating states to obtain reactions to the proposed, structured movement-of-work questions. Although not universally positive, the results exceeded initial expectations as reflected by the following comment in one regional office summary, “*Most states’ experiences have been unexpectedly positive (at least, I was surprised). According to the status reports, respondents were willing and able to provide the data.*” One of the most commonly cited problems was difficulty locating a knowledgeable respondent, but this had been a recurring problem in the regular MLS interview. Since the evaluation indicated that the questions appeared to be working as intended, and that employers would provide the information, it was decided to introduce the questions to all the states during the annual training conference.

To broach the subject of introducing a structured sequence of questions into the interview, a presentation was prepared for the 2004 conference and a workshop conducted on the topic of “Structured versus Unstructured Interviewing: Advantages and Disadvantages.” The objective was to introduce the subject, present the advantages and disadvantages as described in the survey methodology literature, introduce the new movement-of-work questions, ask for reactions, and lay the groundwork for a process that would hopefully lead to acceptance of a more scripted interview.

Rather than focus solely on the advantages of standardized interviewing and ignore the fact that much of the audience was hostile to the basic approach, the initial workshop presentation reviewed the expectations associated with normal communication and then presented a brief history of the development and use of standardized interviewing as a means of controlling interviewer error in survey research. The presentation also dealt with, and discussed, criticisms of standardized interviewing offered by a variety of critics (for example, Suchman and Jordan, 1990), including the criticisms that standardized interviewing:

- Violates the rules of normal conversation and interaction.
- Is rigid, so that respondents often give answers out of sequence or before questions can be finished.
- Assumes that one approach can be developed to fit all situations.
- Can result in the interviewer sounding robotic and inattentive (i.e., behaving like an automaton) – hence, harming rapport.
- Ignores the reality that although the same words may be used, comprehension might differ, and identifying when a lack of comprehension occurs can be difficult.
- Exists because we don't trust the judgment of interviewers, or aren't willing to train them well enough to trust them.

In contrast to the preceding drawbacks, the workshop also covered the advantages of structured interviewing and emphasized how well-designed, pre-tested, standardized interviewing scripts, supported by training, could closely approximate a conversational interview.

Evaluation at this point consisted of a lively discussion of these points and gave the State Analysts the opportunity to express any concerns about structured interviewing, as well as the addition of new questions to the survey.

2.4 Step 2 – Conduct Cognitive Interviewing Studies

Although the movement-of-work questions had undergone an extensive expert review and been used in a small feasibility study in several states, the next step was to subject the questions to more intensive pretesting. Therefore, later in 2004, two cognitive interviewing studies were completed with actual employers. These studies were supplemented by visits to state offices to observe the interviewing process and to obtain feedback from the interviewers about challenges they faced (both recently hired and experienced interviewers were observed).

2.4.1 Evaluation – Results from the Cognitive Interviews

Results from the cognitive interviews led to the conclusions that employers clearly understood the movement-of-work questions as written, and most employers were willing to provide the information (a few concerns about confidentiality were expressed). Results from the onsite observations revealed that State Analysts would benefit from the development of more easily used job aids and references. As a result of these evaluations, the decision was made to develop a completely structured interviewing script for the entire employer interview.

2.5 Step 3 – Expand Standardization to the Entire Interview

With the success of introducing the standardized movement-of-work questions, program management pursued standardization of the entire interview. Alternative versions of a questionnaire were developed and evaluated through an expert review by the state Policy Advisory Council early in 2005.

During the spring of 2005, all State Analysts were surveyed to determine their views on the current data collection process and any problems or issues that they were experiencing in their work. During the 2005 training conference, results from the work-process survey were presented during a workshop (this was part of the feedback process),

and a second workshop was held that asked the State Analysts to draft what they thought would be an optimal structured interview.

In the workshop to develop the standardized script, State Analysts were randomly divided into small groups and asked to work together to draft standardized introductions, question wording, and question order for the required MLS data elements. Their stated objective was to produce a script that would be the “ideal” tool for training a newly hired State Analyst. After the workshop was concluded, a follow-up review and comparison of the scripts led to the following general conclusions:

1. Question wording and order developed for the standardized scripts differed significantly enough among the groups that data quality would likely be affected.
2. Some of the suggested standardized introductions failed to meet the basic criteria specified by OMB.
3. All of the workshop groups had accepted and incorporated the standardized wording that had been developed for the movement-of-work questions, although there remained some debate about the most effective order of appearance of this series of questions within the overall interview.

This last conclusion was especially revealing because it demonstrated that the analysts, even the most experienced ones, approved of the standardized question wording developed for the movement-of-work questions. This was viewed as an important building block for introducing additional structure.

As a follow-up activity after the training conference, BLS questionnaire design experts combined the various scripts and developed a single standardized script (some alternative formats were also developed). As was done previously with the movement of work questions, draft forms were sent to and reviewed by the advisory committee.²

In the next training conference in June 2006, the proposed standardized script was introduced to all the State Analysts to obtain their general reactions and any suggested changes. As had been done the year before, workshops were organized to accomplish two goals: (1) identify concerns with wording or question order, (2) suggest changes to the script, and (3) develop job aids that would help the analysts conduct the MLS interview when using the script. The primary objective of these job aids was to summarize critical information in a more easily used format than was found in the existing interviewer’s manual and other reference documents. The job aids developed included a simplified presentation (summary) of each question’s objectives, a list of issues/problems that might arise when a question was asked (along with suggested solutions), a list of questions frequently asked by respondents (along with suggested answers), and a checklist of preparatory activities that analysts should take before placing a call to an employer. The preparatory, pre-interview job aid was considered especially important because analysts could learn a great deal about layoffs by visiting company websites, reviewing WARN³ notices, etc.

² The draft forms were paper.

³ Worker Adjustment and Retraining Notification Act (WARN). Companies with 100 or more employees must legally provide 60 days advance notice of covered plant closings and covered mass layoffs.

2.5.1 Evaluation – Feasibility Study of the Fully Standardized Interview

In the fall of 2006, 10 states participated in a test using the newly scripted interview. The structured interview also included a completely new question on business function, which is a new way of describing the basic processes of a firm (Brown, 2008). This test lasted two months. After using the script, analysts were asked to provide detailed feedback by completing an evaluation questionnaire. The major findings were the following:

1. In general, the standardized script worked well, with some exceptions:
 - The script was viewed as being too rigid and potentially damaging to good relationships with respondents who had been contacted multiple times in the past.
 - Some of the question wording and order was not considered flexible enough. For example, one analyst asked why the full introduction had to be given when calling a respondent who was very familiar with the MLS.
 - In some states, analysts believed that to avoid refusals it was important to avoid terms such as layoff, so they wanted to use other terms such as a “reduction in staff” when asking about layoffs.

Based on how often questions were reportedly reworded during the feasibility test, some questions were identified for revision. The order of the questions appeared to be satisfactory with a couple of possible exceptions that remained open for further discussion.

2. The new question on business function worked well. In addition, interviewers noted:
 - Relatively few respondents had difficulty answering the question, with most employers responding with a business function (one or more) in their immediate response to the question.
 - The suggested question wording was used most of the time.
3. Newer, less experienced analysts clearly gave more positive ratings to the standardized approach than more highly experienced analysts.

Based on the results of this evaluation, some additional changes were made to the script, which were once again reviewed by the advisory group.

2.6 Step 4 - Include the Standardized Script as Part of a General Survey Redesign

Although some slight disagreements about question wording on the standardized interviewing script remained, a version of it was introduced in January 2007, along with several other changes to the survey (case management and processing software, etc.). This redesign was supported by a national training conference held in January 2007, during which the standardized interview and job aids were introduced to all participating states. Workshops were conducted that provided basic training on use of the script and all associated job aids.

2.6.1 Follow-up Evaluation

After the training conference, all State Analysts were asked to use the standardized interviewing script for two months and then to complete a summary evaluation form.

Some of the objectives of the evaluation were to determine how often the script was being used, and if its use was affected by whether or not the employer was a first-time or repeat respondent. The next table shows how often the script was reportedly used with first-time respondents.

Table 1: How often did you make use of the scripted interview when contacting **new** employers (employers that had not been contacted previously about MLS)?

	February Percent (N=53)	March Percent (N=51)
All the time	37.7	40.4
Almost all the time	26.4	26.9
A majority of the time	9.4	5.8
About half the time	5.7	1.9
Less than half the time	3.8	3.8
Almost never	0.0	9.6
Never	9.4	5.8
Not answered	7.5	5.8

As shown in the preceding table, State Analysts use of the script changed little as they gained more experience with it. In February, about 64 percent of the State Analysts reported that they used the script “all the time” or “almost all the time” when contacting new employers. In March, this figure increased slightly to about 67 percent. However, in February, about 13 percent reportedly used the script “less than half of the time” or “never,” whereas this figure increased to about 19 percent in March. However, none of these changes were statistically significant (chi-square = 7.02, degrees of freedom = 6 probability = 0.319).

The next table shows the reported use of the script when respondents who had been contacted in the past (repeat) were called.

Table 2: How often did you make use of the scripted interview when contacting **repeat** employers (employers that you, or someone else, had previously contacted about MLS)?

	February Percent (N=53)	March Percent (N=51)
All the time	35.8	28.8
Almost all the time	15.1	17.3
A majority of the time	9.4	15.4
About half the time	18.9	1.9
Less than half the time	1.9	5.8
Almost never	11.3	15.4
Never	5.7	9.6
Not answered	1.9	5.8

In this case, reported use of the script decreased. In February, about 51 percent of the analysts reported that they used the script “all the time” or “almost all the time” when calling “repeat” employers. In March, this figure was about 46 percent. In February, about 19 percent used the script “less than half of the time,” “almost never,” or “never,” whereas this figure increased to about 31 percent in March. Although the monthly

changes were more dramatic, they were not statistically significant (chi-square = 10.3, degrees of freedom = 6, probability = 0.113).

The next table compares the reported use of the script in February when analysts were calling either new or repeat respondents.

Table 3: Comparison of Use of Script with First-time and Repeat Respondents in February (N=53)

	First-time Respondent	Repeat Respondent
All the time	37.7	35.8
Almost all the time	26.4	15.1
A majority of the time	9.4	9.4
About half the time	5.7	18.9
Less than half the time	3.8	1.9
Almost never	0.0	11.3
Never	9.4	5.7
Not answered	7.5	1.9

Differences in the preceding table are not statistically significant (chi-square = 12.2, degrees of freedom = 6, probability = 0.058). Nor were the comparisons for March significant (chi-square = 5.75, degrees of freedom = 6, probability = 0.452).

Table 4: Comparison of Use of Script with First-time and Repeat Respondents in March (N=51)

	First-time Respondent	Repeat Respondent
All the time	40.4	28.8
Almost all the time	26.9	17.3
A majority of the time	5.8	15.4
About half the time	1.9	1.9
Less than half the time	3.8	5.8
Almost never	9.6	15.4
Never	5.8	9.6
Not answered	5.8	5.8

It is worth noting that although use of the standardized script dropped off in the second month, 73 percent of the analysts reported using the script at least a majority of the time with new respondents (61.5 percent for repeat respondents). Since this research was a cooperative effort, we were encouraged that State Analysts were willing to try the script, especially with new respondents. Less frequent use of the script with repeat respondents was not surprising considering the nature of these calls.

As in previous evaluations, the results showed that locating a knowledgeable respondent remained the single biggest challenge to obtaining quality data. Once a knowledgeable respondent was located, the script, and the new question on business function, reportedly worked well. The script was generally viewed as a useful tool by a majority of State Analysts, but a small number of highly experienced analysts remained opposed to its use. In addition, some changes, for example, to some of the question wording remained open for future discussion.

In a more recent 2008 survey, State Analysts were once again asked about operational issues or problems in data collection that they would like to bring to the attention of survey managers. This time the question about use of the standardized script was asked differently to try to better understand more clearly what analysts meant by “using the script.” Analysts were given a choice of descriptive statements and asked to mark the ones that most applied to them. A summary of their selections is shown in the next table.

Table 5: How Do Analysts Describe Their Use of the Script (N=47)?
(more than one response could be checked)

How Do You Use the Script?	Percent
The script helps me to remember what questions to ask, but I modify <i>the wording of questions</i> based on the situation or a respondent's answers/behavior	54
I use the script to write down a respondent's answers prior to entering them into WinMLS	46
The script helps me to remember what questions to ask, but I modify the <i>order</i> of the questions based on the situation or a respondent's answers or behavior	41
The script helps me to remember what questions to ask, but I do not ask certain questions if such questions seem irrelevant or if the respondent seems uncooperative	37
The script helps me to ask questions using basically the same order for almost all interviews	28
The wording and ordering (sequencing) of questions in the script are sometimes changed, but only in the case of employers who I have interviewed repeatedly	26
The script is followed faithfully – word for word and in the prescribed order – for almost all respondents	11
With the exception of the questions on business function and movement of work, I rarely use the script when conducting MLS interviews	9

Based on these responses, it can be seen that most analysts did not rigidly adhere to the script. There were two relatively small groups of interviewers: one which did not use the standardized script at all (9 percent), and one which used it faithfully (11 percent). In between, the vast majority of analysts reported that they used the script, but used it with flexibility, modifying the question wording and order if the situation demanded it.

3. Impact on Survey Quality

Because of the way the standardized script was introduced, no definitive statements can be made about its direct impact on data quality. However, some immediate benefits were apparent. Because of the inherent complexity of new concepts added to the survey, the survey managers believe that without standardization, collecting data on the concepts of movement of work (offshoring/outsourcing) and business function would have been far less successful. Also, an analysis of the system after implementation of the standardized script revealed no significant problems either with the employers interviewed or the data collectors' performance (Brown, 2008). Therefore, survey managers were pleased with

the degree of implementation of the approach. Anecdotal evidence suggests that use of the script has also had no noticeable effect on response rates. Response rates for the survey have remained in the low 80s for many years.

4. Discussion

Because it was not possible to conduct controlled experimental studies, use of an action-research model led to frequent quantitative and qualitative evaluations (surveys, workshops, etc.) to keep analysts involved in the implementation process and to gain their support. In the context of a program like the MLS, the use of action research produced useful results, even in the absence of controlled experimental studies. Key advantages of the approach were that it allowed for participative decision-making, drew on the expertise of experienced interviewing staff, and by involving State Analysts (interviewers) in the process, gained their commitment and support.

Since a transition from a conversational interviewing approach to a more structured approach was such a major change, the iterative process of introducing a change, evaluating the change, and then planning the next phase led to a gradual introduction of more structure into the interview. The entire process described in this paper took three years, although the work described was not continuous during this time.

Although there has been an ongoing debate in the survey literature about the superiority of standardized or conversational interviewing, in practice this argument is not as clear-cut as it first appears to be. Rather than a dichotomy, the use of standardization should be viewed as occurring on a continuum. Even the most loosely structured conversational interviews have some degree of standardization (they try to obtain the same data elements), and many survey organizations that profess to use standardized interviewing rarely use the extreme approach suggested by Fowler and Mangione (1990). As Weisberg notes, “standardization is often stated as an ideal, but it is often not achieved” (2005, p. 48). So, as pointed out by Viterna and Maynard (2002), the basic question is not whether survey researchers will depart from standardization, but how much they will depart, and to what extent this interferes with the quality of survey data.

In MLS, the decision was made to introduce more standardization, but to also rely on the experience, judgment, skill, and training of the State Analysts, and to draw them into the developmental process. In fact, management made the message quite clear that the standardized script should be viewed as an interviewing aid, but that analysts’ judgment and experience remained very important. Further, to support use of the script, management made a significant investment in the development of improved training and job aids, and implemented methods to ensure analysts’ opinions were being heard.

An immediate benefit of introducing more standardization was that it allowed managers to quickly address two new concepts of immediate importance: (1) Measuring the movement of work resulting from offshoring and outsourcing, and (2) Determining the business functions of jobs affected by layoffs.

Based on the variety of evaluation efforts used, the general implementation strategy seemed to work, and a large percentage of the State Analysts were willing to at least try the standardized script and accompanying job-support materials (job aids) in some manner. It is also worth noting that acceptance of the script was higher among new analysts; therefore, with time, wider use of the script might result. However, the data

also clearly show that most interviewers used a hybrid approach, rather than the more rigid, structured approach recommended by some survey methodologists. In this context it's worth ending this discussion with a quote from van der Zouwen (2002):

“Because the rules of standardization can never be complete, interviewers will inevitably alternate between the rules for the standardization of conduct and the interactive resources they have mastered in other, uncontrolled, social contexts for handling emergent, situational contingencies that form their interactions with respondents.”

Most MLS interviewers clearly felt the need to draw on expertise that they had developed in other social contexts.

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