



*Center for Public Opinion and
Policy Research*

CPOPR Survey Interviewer Manual

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Introduction

Welcome to the CPOPR Staff! In this manual you will find a few key concepts that will be helpful to remember throughout your time working as a survey interviewer. This manual includes: a short background on different forms of polling; a brief history of the CPOPR; a summary of your responsibilities as an interviewer; helpful tips for using the CATI system; an overview of forms of bias in survey research, how to minimize bias, and basic interview procedures.

Public Opinion Polling and Other Forms of Polling

Polling is an opportunity for citizens to more directly participate in democracy. Public opinion polling can provide answers to questions and influence how politicians respond to public issues. Members of society make major economic and career decisions based on public opinion research findings. Examples include a City Council that wants to find out what its citizens need most, or a television station that wants to find out which programs its viewers most enjoy. Interestingly, the results of one 2008 Winthrop Poll led candidate Obama to reshape parts of his campaign leading up to the 2008 general election.

Public opinion polls are also beneficial because it is an opportunity for citizens to learn about others and to resolve myths and stereotypes that might otherwise mislead the public. An example of this can be seen with a 1993 USA Today/CNN/Gallup poll, which asked a series of questions relating to various topics on gun control. The results concluded that there was not a significant difference on many of those topics between the attitudes of gun owners and non-gun owners.

Factors that determine how effective a poll is in measuring how people actually feel include the way questions are worded, how people are selected to participate, and how an interview is conducted. The priority pollsters place on these factors divide polls into distinct types: unscientific and scientific polls.

Pseudo-polls/Unscientific Polls

Pseudo-polls, or unscientific polls, are not legitimate efforts to measure public opinion, but rather attempts to gather a particular end result which suits the surveyor's own interests. Pseudo-polls give legitimate, scientific polls a bad name because when the public learns of them, they may assume that *all* polls are pseudo-polls. "Pseudo-polls are highly flawed and may give misleading portraits of public opinion because of loaded and unfair question wording" (Groves, 2004).

Push-polls are a type of pseudo-poll. The people that conduct these sorts of polls are more interested in their own agenda, rather than an accurate account of the public's opinion. Example: Polls conducted by political parties that ask if respondents will vote for their candidate, a questions which sometimes follows disparaging information about their opponent.

Straw-polls are polls which use a *convenience* sample, as opposed to a *representative* sample of the population. For example, when news station *ABC123* asks its viewers to call in to give their opinion, they are polling a sample of convenience. The results of the poll will only be representative of *ABC123* viewers, not the general public.

Scientific Polls

Scientific polls are representative of the population, in contrast to unscientific polls, which often rely on a sample of convenience. Scientific polls reflect how the overall population feels by *randomly sampling* the population. Just as the doctor only needs to draw a few drops of blood to draw a conclusion about your health, scientific polls only require a small portion of the larger population to draw conclusions about how the overall population feels about certain issues.

Scientific polls only have one agenda: minimize bias to measure true opinion to the best of one's ability. Whereas push-polls aim to persuade respondents in a certain direction, scientific polls only aim to measure the way the respondent truly feels about an issue or topic.

About the Center for Public Opinion & Policy Research (CPOPR)

The Center for Public Opinion & Policy Research (CPOPR) is a full-service survey research and data analysis entity associated with Winthrop University, serving both public and private organizations. It offers survey consulting, research instrument construction, data collection, and data analysis. The CPOPR employs a state-of-the-art Computer Aided Telephone Interviewing (CATI) system for telephone based surveys. The CPOPR offers on-line and face-to-face survey research capabilities and conducts focus group analysis as needed by clients.

The CPOPR was founded by Dr. Scott H. Huffmon in the spring of 2002. The lab is a research arm of the Department of Political Science at Winthrop.

Since Winthrop University is a proud public institution, the CPOPR counts public service as a key goal. In addition to providing the public and policy makers accurate information through The Winthrop Poll, the CPOPR also seeks to provide top quality and affordable research services to public and private institutions.

Additionally, the lab serves as a research platform for university faculty members, especially those in the social and behavioral sciences, by providing facilities and expertise for survey-based and experimental research projects.

Finally, in helping fulfill Winthrop's creed of "Live, Learn, Lead," the CPOPR offers students real-world, experiential-learning opportunities by incorporating survey research experience into several courses.

Because work in this lab involves the study of human participants, it is vital that callers strictly adhere to the ethical standards laid out by the *American Association for Public Opinion Research* as well as those spelled out by Winthrop University's Institutional Review Board (IRB).

Your Primary Responsibilities as a Caller:

- 1.) **To never mislead or lie to a respondent.** This could be by mistake or on purpose. Example of mistake: you tell someone that “the survey takes 5 minutes,” when the survey really takes 10-12 minutes, however you did not know this detail when informing them. Example of misleading on purpose: Telling the respondent the survey takes 5 minutes when you know that it really takes longer. Give the respondent accurate information so that they can make an educated decision as to whether or not to participate.
- 2.) **You must gain informed consent** from the respondent before proceeding to the survey. Make sure to provide the following information: Your name, where you are calling from, why you are calling, how long the survey should take, the fact that everything is confidential, that there are no right or wrong answers, and they can skip any question or end the survey at any time. You must also make sure that the respondent is at least 18 years old. You will be prompted to get this information across to the respondent while reading through your caller script, located at your station.
- 3.) **You must never falsify information** when conducting the survey. If the respondent did not give an answer from the options you listed for them, do not assume their answer, but rather reread the options and ask them to select from those choices.

Informed Consent

Give the respondent all the necessary information that they need to make an educated decision about participating in the survey. This information is provided in your introduction script you will see at your station and includes:

- 1.) Your name
- 2.) The location from which you are calling: Winthrop University
- 3.) The purpose of the survey (to gain their opinion about society and politics)
- 4.) The time it will take to complete the survey (changes each poll)
- 5.) A statement that informs the respondent that all their information will be confidential.
- 6.) A reminder that they can skip any question or stop the survey at any time.

Overcoming Respondent Hesitation

Many times, when someone answers the phone they will initially be dismissive or uninterested. However, this may be because the person you are calling thinks you are a telemarketer or someone calling from a political campaign. The sooner you establish who you are and why you are calling, the more likely they are to remain on the phone and start the survey.

Confidence is important because it will reassure the person you are speaking with of the credibility of our project and make them feel more comfortable completing the survey with you. If you are nervous, it's ok—just let them know you are new if you make a mistake. If they ask you a question that you cannot answer, you can always ask one of the supervisors or the operations manager.

What follows are a few common objections respondents give to not taking the survey. Refusing to participate is completely their choice, however it's important they are informed about why we are *actually* calling rather than why they might *assume* we are calling before making their decision. Below are a few suggestions on how to overcome these sorts of respondent hesitations to participating:

1. ***The respondent tells you that they do not have enough time.*** If this is the case, the best thing to do is to try to schedule a call back time. Be sure to get a name and ask for the most convenient time within our calling hours to call back. If you were not able to get a name and/or callback time, be sure to note who agreed to take the survey (oldest/youngest male/female) the best you can, and schedule the callback sometimes during our calling hours.
2. ***Sometimes the respondent will ask you what the point of the survey is.*** Your response to this question largely depends upon the purpose of the survey. In general, our polls are about society and politics. You should never tell respondents exact questions in the survey unless you are actually giving them the survey and recording their answers. The survey questions are ordered in a particular way so that certain questions do not bias the respondent's answers to later questions. Revealing questions prior to entering the interview introduces bias into our overall study.
3. ***Respondents may also ask about what kinds of questions you will ask them.*** A good response to this question, without biasing the survey, is “the survey is just about society and politics, in general.” OR, “we are asking about topics in the news lately.”
4. ***On occasion the respondent may tell you that they do not know enough to take the survey.*** That's ok! All we are looking for is their opinion—there are no right or wrong answers. Additionally, they can skip any question or stop the survey at any time.

5. *They may show hesitation about giving out personal information.*

Reassure them about the confidentiality of the survey, and tell them that they do not have to answer any question they do not feel comfortable answering. However, most personal information is grouped into broad categories, rather than anything specific. For example, when asking about income, we ask respondents to answer within a range rather than in exact amounts. This is so we can compare different demographics of the population—as well as a way to be sure we are being representative of the overall population we are studying.

6. *Many respondents will ask you how you got their number.* They may also add that they are “on the do-not-call list.” In this case, it is important that you tell them that their number was randomly generated by the computer. On questions concerning the do-not-call list, all surveys run by academic institutions such as Winthrop University are exempt by law. However, if they do not wish to be called back, that is always their choice.

Role of the Interviewer Using the Computer-Assisted Telephone Interview (CATI) System

“Often, when I am a respondent, I ask the interviewer what a certain question means or complain about the range of alternatives available to me. Some interviewers are well-trained to handle such reactions, but others are not. One interviewer agreed with my frustration about a particular item and informed me that there had been many complaints about the survey. Another interviewer – when I strenuously objected to the alternatives offered – pleaded with me to pick one of the given choices because he did not know how to handle volunteered responses. In yet another situation the interviewer told me that she would place my aberrant response in the category in which she thought it would best fit.”

-Herbert Asher, author of “Polling and the Public”

The above describes how situations can be handled by trained interviewers and interviewers that have not received adequate training. In this next section, we will discuss the role and responsibilities of the interviewer, including appropriate administration of surveys, consistency in interviewing, and reacting to different situations with respondents.

“Response Effect”

Sometimes during an interview, respondents may feel pressured to answer sensitive questions (e.g., drug use, voting behavior, perspectives on race, gender, sexuality) a certain way because of the presence of the interviewer. The pressure to conform to social norms creates the tendency for respondents to underreport behaviors or opinions that may be deemed socially undesirable.

To minimize social desirability bias, researchers word questions in a way that makes respondents feel more comfortable giving honest answers to sensitive questions. Additionally, interviewers like you are instrumental to ensuring that this bias is minimized by not deviating from question wording or adding wording to questions.

This is also why it is so important that interviewers never *affirm* or *negate* respondents’ answers to survey questions. The conversation must be neutral with responses like, “Ok” rather than a response like “good,” or a response that gives them the impression that you disapprove of their answer.

Ways to Reduce “Interviewer Effect”

- 1) Interacting with the respondent in a professional manner and in a way that in no way interferes with how they would truly answer the question,
- 2) Reading questions EXACTLY as worded,

- 3) Probing for an exact answer, without increasing the likelihood that they will choose one answer over another,
- 4) Recording answers accurately, instead of interpreting or paraphrasing what you think they may have said.

Consistency

Interviewers must read the questions exactly as worded every single time they give a survey. Each survey given is a repetition of a scientific experiment. If we want to compare our observations, we need to ensure that everyone's opinions were measured using the same instrument (questionnaire).

Being consistent also entails asking the questions in their set order, not commenting or stating one's personal opinions, and asking each question in its entirety. **If interviewers are not consistent, the accuracy, and thus usefulness, of the data we gather is threatened.**

Effects Based on the Interviewer's Experience

The experience of an interviewer is beneficial to the interview process because they make the respondent feel more comfortable and ensure that the interview runs smoothly overall. However, a study conducted by the National Survey on Drug Use and Health (NSDUH) in 1998, found that experienced interviewers obtained a lower report of drug use among the population than interviewers with little experience. In other words, **newer interviewers gave a higher quality/scientific interview than more experienced interviewers.**

It is not known for certain why this is, but one possibility is that more experienced interviewers may be more concerned with tallying-up completions, where as new interviewers are concerns with obtaining a thorough and accurate interview (Groves, 2004).

More experienced interviewers should interpret this study as good reason to evaluate their own survey interview habits. This is also why it is important that we review the concepts in this manual regularly.

Survey Procedures

Once the respondent has agreed to the survey there are some important procedures that you need to be aware of and follow in order to maintain the scientific integrity of this study. Some of this is review from the previous section, but that is because of its importance to the survey procedure.

First and foremost, **do not deviate from the script** while administering the survey. Every survey has to be given to every respondent in the same way, this means that you cannot add or subtract words, alter sentences or do anything else to the question as it is stated on your screen. If there are deviations from the script, it could destroy the scientific accuracy of the survey.

Question Clarification

Sometimes respondents will be confused by a question that is asked in the survey and will ask you to rephrase it or offer them some sort of clarification so that they can answer the question. Since it is important that you never reword or leave out any words from the question, the only thing you can do is reread the question to the respondent. Two things you can offer if they are confused is, “just in general, what is your opinion?” Or, “The meaning of the question is however you interpret it.”

If they still fail to understand the question or cannot answer it, simply skip that question by clicking the “next” button at the bottom of the screen.

It is important that you do not say anything more than this because to do so would change the question which distorts the scientific nature of the question. To recap the process of clarification:

- 1.) Repeat the question at a slower pace.
- 2.) Use terms like “In general. . .” when offering help to the respondent.
- 3.) If the question is still unclear and the respondent cannot give a response, click “next” to move on to the next question.

When to clarify what a respondent meant by their answer

Clarifying what a respondent said in answering a question will be necessary in a variety of situations. In one a series of questions, for example, there is the same response set, or answer options: *strongly agree, agree, neither agree nor disagree, disagree, strongly disagree*. When the respondent does not give an answer that matches one of these responses, you must ask them to choose which option from the list best fits their opinion.

Let’s take the following example:

You: “Human impact is partially to blame for global warming. Do you *strongly agree, agree, neither agree nor disagree, disagree, strongly disagree* with this statement?”

Respondent: “yes.”

Because you cannot assume to know what the respondent’s answer to this is, you will have to ask them to clarify their answer.

You: So would you say you *strongly agree, agree, neither agree nor disagree, disagree, strongly disagree* with this statement?”

Quotas?

The goal of the CPOPR will always be quality over quantity. While we need a certain amount of surveys to publish our findings, you will never be required to meet a personal quota. You should be able to get enough respondents to complete the survey with you simply by following the methods and techniques you learned in training.

It is most important that interviewers prioritize accuracy when administering surveys. This means following up with the respondent if they gave you an answer that was not from the list of options in the question, or asking the respondent to explain their answer to an open-ended question if you do not know how to categorize their answer—to name just two examples.

Troubleshooting

Hearing Problems

There are two common scenarios when it comes to listening problems. The first is the respondent's inability to hear you read questions, and the second is that you, the caller, cannot hear the respondent's answer.

The first problem is a bit tricky to solve. The immediate solution to the problem is to make sure the volume adjustment on the phone is all the way up. The next thing you can do is try to speak louder.

If this does not work, one can try to have the respondent move to a quieter room in the house. If all else fails, you will just have to be patient and try your best to communicate.

The second hearing problem, when you the caller cannot hear the respondent, is normally an easy issue to solve. The first thing that can be done is to ensure the volume is turned up all the way on the phone. If this was not the problem, and you notice volume issues with multiple calls in a row, we may need to replace your phone and/or headset.

Language Barriers

In some occasions you may find that, for the number you dialed, there are no English speakers in the home. In this case, the only thing that can be done is to thank the respondent for his/her time and code the call "language/deaf."

Unfortunately, we can only administer the survey in English at the moment. Even if you are fluent in another language, you should not translate the survey. Recall from the previous sections on questions wording. Translating the survey, especially on the spot, changes the wording when translating to another language. This translation hasn't been through the same rigorous scientific question writing process that the English version of the questions have.

Computer Problems and Power Failure

Computer problems and power failures are rare occurrences in the lab. The most frustrating problem is that one's computer may freeze in the middle of giving a survey. If this happens, ask the respondent if we can give them a callback. Try your best to minimize the survey screen to get their phone number—however, if the computer is frozen you may not be able to do this. After you have hung up the phone, call over one of the supervisors or the operations manager. They will take it from there.

Respondent Drifts Away from the Survey

From time to time you may encounter respondents who want to chat about the question and/or engage you in conversation. This is problematic because it is time consuming and unproductive.

It is important that you bring the respondent back to the survey so that you can complete it. You may feel rude interrupting the respondent, but they will likely understand that this is not a social call, but rather you have a job to do. Speaking from personal experience, I have never been hung up on or yelled at by a respondent when I have politely nudged them to continue the survey. While this won't always be the outcome for everyone, the point is that this "nudging" is part of your job and the respondent likely understand that.

What follows are a few suggested lines to get the caller to focus on the survey:

- 2.) "I don't want to keep you for too long, so here is the next question..."
- 3.) "I think there may be questions related to that topic later on, so if you could hold your thoughts we may be there soon."

The key is to be respectful and polite and the respondent will more than likely finish the survey with few problems.

Respondent Asks for Additional Information

Sometimes a respondent will ask you what a question means, who someone is, or what you think the answer is. Remember, there are no right or wrong answers—we are just interested in their opinion.

Your response to them should be that you are not allowed to answer the questions yourself or give your own opinion. Additionally, you cannot inform them about subject matter that they may be unfamiliar with.

For example, if you ask them how favorable or unfavorable they feel towards Senator Tim Scott, and they ask, "Who is he?" you should not inform them of who Tim Scott is. Rather, simply respond, "we can just skip that question."

We want to measure the opinion that respondents already have about a representative. If they do not know who the representative is, then they have not yet formulated an opinion about them.

If you inform them of who that representative is while giving them the survey, you impact the opinion they formulate about that person. In sum, if they are unfamiliar with the subject of the question, simply skip that question.

Problematic Respondents

If a respondent verbally attacks you, either in regards to you or in regards to the survey, you may hang up the phone and code the call as “Refused.” This decision is yours to make. You will never be required to endure a personal verbal attack as part of your job. If the verbal attack is not personal, but frustration directed toward the survey, determine whether you think the respondent will start and finish the survey in a timely manner.

This being said, few people will be “enthusiastic” about you calling—mostly for good reason—possibly the strangers that have called them in the past have been trying to sell them something. However, lack of enthusiasm or grumpiness is not a reason to mark a number as “refused.” Refused is, of course, also used when the respondent verbally declines to participate upon being informed of the reason for our call.

Call Coding

As you make calls in the lab, one of the main menus you will see is the call coding menu. What follows is a list of codes that you will mark once you have completed a call during your shift:

- **1 Complete:** You just completed a survey with a respondent. This is the ONLY time you will use this code.
- **2 Schedule Callback:** If a respondent cannot take the survey when you call, but they would like to take it at a later time. Be sure let them know the dates and times we call and to ask for a name. You may also use this to stop in the middle of a survey and finish later ("skip" then "done"). You may also use this code if you accidentally hang up on the respondent ("skip" then "done.")
- **3 Refused:** They explicitly say they do not want to participate after you have explained to them why they are calling--not to be confused with "Hung Up."
- **4 Terminated Early:** They answer some questions, but end the survey early and do not want to be called back to finish it. This is different from if they suddenly hang up—their phone may have just gotten disconnected. In this case, schedule a callback for 1 minute later, with a note, and ask if you got disconnected and would like to continue with the survey.
- **5 Government/business:** You accidentally call Domino's Pizza, for example. 📞
- **6 Answering Machine:** Code if your call is taken to a voicemail or answering machine. Only leave a message if you do not see "answering machine" or "schedule callback" in the call history already. If it is already in the call history, simply hang up and code "answering machine." If not, leave a message and code "answering machine."
- **7 Language/Deaf:** No one in the household speaks English or the person you are looking for (Registered Voter, for example) cannot use the phone because they are deaf/hard-of-hearing. Even if you're fluent in another language, don't give the survey unless in English – wording will not be the same.
- **8 Nonworking number:** "The number you have dialed has been disconnected... Beep...beep...beep..."
- **9 Busy:** Busy tone.
- **10 No Answer:** Only let the phone ring 5 times, then hang up. Code as No Answer.

- **11 No Eligible Respondent:** Wireless: cell phone belongs to someone under 18.
Registered Voter or Youngest/Oldest Male/Female: The only time someone is not eligible in this sample is if they no longer live in SC (or population we are surveying).
- **12 Hung Up:** Someone hangs up on you before you have the chance to explain why you are calling. They could think they are hanging up on a telemarketer and actually want to take the survey once they listen to what you say.