Using a Staffing Agency for Recruiting CAPI Interviewers on a Large National Study

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Overview

- The Wisconsin Longitudinal Study
- How do we staff a national CAPI study?
- Lessons learned
The Wisconsin Longitudinal Study

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The Wisconsin Longitudinal Study (WLS)

- Original sample: 10,000 high school graduates interviewed in 1957
- Siblings and spouses added over the years
- UWSC collected last two waves in 1992 and 2004 via telephone and mail
The Wisconsin Longitudinal Study (WLS)

- WLS 2010 - 2012
- Switching mode to CAPI with follow up SAQ
- 12,232 possible participants
- Interview length = 2.5 hours
- 9 anthropometric measures
- Cognitive testing
- DNA sample collection (saliva)
- National study with a 22 month field period
How does we staff a national CAPI study?
UWSC CAPI History

- Smaller and more local
  - Midwest Young Adult study (MYA)
    - n=600 in IL, IA and WI
    - 45 minute interview
  - Milwaukee Area Renters Study (MARS)
    - n=2,000
    - 30 minute interview
  - Mid Life in the United States (MIDUS) Oversample
    - Milwaukee area
    - N=600
    - 45 minute interview
How do we staff a national CAPI study?

• Wisconsin Longitudinal Study
  • Participants in all 50 states
  • 66% sample in WI, 75% in Midwest
  • 25% spread throughout United States
    • Urban hotspots
Questions that needed answers…

- What kind, and how many staff do we need?
- Do we use the UW system or private staffing agency?
- What are the quality, attrition and cost implications?
What kind of staff do we need?

- Full time?
  - Not in our experience, or others
  - Participants dictate Interviewer’s schedule week to week
  - Difficult to manage CAPI workload @ 40 hrs every week
  - Heavy travel periods coupled with down time

- Sample flow lighter/heavier

- Need part time ~25-28 hours/wk Interviewers
How many staff do we need?

- How many completes?
  - 12,232 cases * .9 (mortality closeouts, not found) = ~11,000 completes
  - Reflects 90% response rate (ambitious)
  - Client expecting 80% response rate

- 8 hrs/cm in state, 12 hrs/cm out of state
  - 9.3 hrs/cm overall (proportionate to sample)
  - 9.3 hrs/cm * 11,000 completes = ~102,000 hrs
How many staff do we need?

- Casework and Training time
  - 1,232 cases * 4 hrs/resolve = ~5,000 hours
  - Interviewer Training (2 week initial training) = ~5,000
  - Interviewer Training ongoing = ~2,000
- ~115,000 Interviewing hours total to complete project
How many staff do we need?

• If average is 25 hours per week, in a 22 month field period that employee will work 2,200 hours total for the project
• \( \frac{115,000}{2,200} = 52 \) CAPI Interviewers
• Factoring in attrition @ 30% = additional 16 interviewers
• 68 Interviewers to hire
How many staff do we need?

- **WLS Field Structure:**
  - Total of 68
  - 8 Team Leaders @ 40 hrs/wk (25 hrs/wk interviewing)
  - 60 CAPI Interviewers @ 25 hrs/wk
  - 7-8 Interviewers per Team Leader
  - Caseload = 180 cases per Interviewer
How do we hire staff?

- Through the University of Wisconsin system?
- Through a private staffing agency?
- Use both systems?
How do we hire staff?

• Planning committee worries and concerns
• Truly remote management with low proportion of in-person “face time”
• Biased towards the “known entity” quality of our in-house Wisconsin based staff
• Will interviewers hired by a staffing agency
  • Be good enough?
  • Experienced?
  • Trustworthy?
  • Dependable?
• Started to compare systems…
## How do we hire staff?

<table>
<thead>
<tr>
<th>Issue</th>
<th>UW System</th>
<th>Staffing Agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interviewer Wage</td>
<td>Inflexible – single wage that is unchangeable</td>
<td>Flexible – four tiers and freedom to reward raises</td>
</tr>
<tr>
<td>Cost</td>
<td>Mostly fixed, although health insurance varies</td>
<td>Range from 6% less to 33% more that UW</td>
</tr>
<tr>
<td>Hours</td>
<td>Inflexible – either 20 or 40 hours a week</td>
<td>Flexible – work as much or as little as needed</td>
</tr>
<tr>
<td>Interviewer Bonuses</td>
<td>Not allowed</td>
<td>Allowed</td>
</tr>
<tr>
<td>Benefits</td>
<td>Health insurance and vacation for full time</td>
<td>No health, no vacation</td>
</tr>
<tr>
<td>Expense reimbursement</td>
<td>4-6 weeks</td>
<td>1 week</td>
</tr>
<tr>
<td>Auto</td>
<td>UW or DOA Fleet, gas cards, travel cards</td>
<td>Use own car</td>
</tr>
</tbody>
</table>
How do we hire staff?

• Far more flexibility in staffing agency model
• Moreover, we needed help with the task at hand
  • Posting, screening, hiring interviewers all over the US
  • Physical locations to meet in person, check IDs, perform background check, etc
How do we hire staff?

• However…
  • RFP process time consuming
    • Met with UW purchasing starting in 2008
    • Hours of meetings
  • RFP development, editing, and re-editing, took significant amount of several high level staff’s time
    • Proposals considered, counter-proposals offered
    • Interviews granted, re-interviews with companies
    • Scoring process
  • Process drawn out over a year and a half
  • Labor intensive
Determining where we would hire

- Work with Applied Population Lab on UW campus
  - Identified participant-dense areas using GIS software

- Areas that were in excess of ~200 participants within a ~300 mile radius = 1 CAPI Interviewer in the area
  - Rest of sample in “blitz” areas

- Developed list of cities where we needed Interviewers
Determining where we would hire

<table>
<thead>
<tr>
<th>Location</th>
<th>Number of Interviewers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minneapolis or St. Paul MN</td>
<td>2</td>
</tr>
<tr>
<td>Cincinnati, Columbus, or Indianapolis OH or IN</td>
<td>1</td>
</tr>
<tr>
<td>Lansing or Detroit, MI</td>
<td>1</td>
</tr>
<tr>
<td>Orlando, St. Petersburg, or Miami FL</td>
<td>2</td>
</tr>
<tr>
<td>Los Angeles, CA</td>
<td>1</td>
</tr>
<tr>
<td>San Francisco, CA</td>
<td>1</td>
</tr>
<tr>
<td>Milwaukee or Waukesha County, WI</td>
<td>8</td>
</tr>
</tbody>
</table>
Who we hired

- We hired 65 Interviewers and Team Leaders through the staffing agency
- We hired 3 Team Leaders through the UW System
Hiring process

- Staffing agency uses national network to find matches
- Screened and interviewed by staffing agency
- UWSC interview
- In-person/Skype videoconference/phone
- Back to staffing agency to offer/decline
- We put a premium on hiring experienced interviewers
Lessons learned
Lessons learned – Interviewing candidates

- Overall experience has been positive after 14 months
- Key to success
  - Insist on interviewing all candidates
  - A lot of work – over 100 hours
- Via Skype
  - Helped us make better informed choices
  - Body language, expressions, conduct
  - Detailed feedback as to why the candidate wasn’t a good fit for CAPI Interviewing
- “Hit rate” for staffing agency started at 60% but improved to 80%
Lessons learned – Vetting of the staffing agency

• Ask tough questions during RFP process
  • How many offices do you have in WI? In the US?
  • Do you have experience finding people for this type of work?
  • How many CAPI Interviewers do you currently have on staff? In WI? On the East and West coasts?
  • How many projects do you have of this size?
  • How big is your company, how many on your payroll?
  • Provide resumes of staff who meet our screening requirements
Lessons learned – Have thorough screening requirements

- Must be able to work at least ~25 hours per week, including eves/weekends
- Must have own car, auto insurance, valid driver’s license
- Must be flexible, willing and enthusiastic to travel
- Must have credit card and ability to charge $1,000
- Must have high speed internet access from home
- Must be able to lift 40 lbs on a continual basis
- Must pass pre-employment credit check
- Must pass background check
- Tested by staffing agency:
  - Type at least 35 wpm
  - Computer software/hardware savvy
Lessons learned

• Other key points:
  • Double check staffing agency’s work
  • Hiring in right areas, check applicant addresses
  • Terms of the contract
    • Motivation on part of staffing agency
      • Find us a good Interviewer
      • Having interviewers stay for entire project is more profitable for them (and keeps us satisfied)
    • The more experienced the Interviewer the higher rate they can bill us
Lessons learned

- What about quality, experience, trustworthiness and dependability?
Lessons learned - Quality

• Quality of Interviewers overall is high
  • Many social workers, teachers, other professionals hired
  • College degrees
  • Compare well and in some cases outpace our preexisting CAPI staff
Lessons learned - Quality

- Staff we hired transition well to other CAPI studies – have developed sense of UWSC loyalty
- Several have jumped to working on multiple studies for us
- CAPI Interviewers report liking this agency, happy with interactions on payroll and other questions
- We have given regular performance-based raises at 6 month intervals
Lessons learned - Quality

• Several bad experiences
  • Terminated four Interviewers for various performance concerns
  • Difficulty getting equipment returned from some
  • Staffing agency helped us with recovery
    • 100% quality control audio monitoring and verification for selected Interviewers
Experience, Trustworthiness, Dependability

• Experienced
  • Nearly 40% had previous CAPI or Census experience

• Trustworthy
  • No data falsification
  • No incidents of theft

• Dependable…somewhat
  • Our 30% attrition rate? We are nearly there with 10 months left in the study
  • (But…some of this is our fault)
WLS staffing after 14 months in the field

Interviewers

- **Interviewer Current**: 57%
- **Interviewer Attrition**: 29%
- **Interviewer Terminated - Performance**: 6%
- **Interviewer Terminated - Work Flow**: 8%
Thank You!

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