

## Attachment B: Interviewer administered Cognitive Interview Protocol

### **1. Introduction**

- Hi! Thank you for coming in today! I am .....
- We are going to be working with some questions from one of the BLS surveys which asks questions about how households spend their money.
- What we are going to do today is go through some questions from the survey to get your feedback to them.
- The purpose of today's session is to help us find out more about how people, like you, respond to these questions.
  - o We are not here to evaluate you, we are looking to improve the questions, so there are no right or wrong answers.
  - o We are actually more interested in how easy the questions are to understand more than your actual answers.
  - o All the information you give us will be kept completely confidential, and will be used to improve the survey questions.
- Any questions?
- What I'm going to do is go through some questions and get your answers. Then we will talk about what you thought about when you answered the question, how easy or difficult it was to answer, and your reactions to the questions.
- Before we get started, I have three things for you to complete.
  - o The first is a consent form. Take a minute to read it over, and let me know if you have any questions
  - o The second is this form, which is basically a receipt saying you received your check.
    - *Have participant sign consent form and check voucher*
  - o Finally, this is a form which asks some background questions. This information, like everything you say, will be kept confidential, just used to help us better understand your feedback.
    - *Have participant complete background form*

- Let me know at any point if you have a question or comment, or if you need to take a break.
- Finally, before we get started I'd like your permission to audio tape our interview. The recording will be used to supplement the notes I'm going to take, and will be kept confidential.

2. **Proxy Reporting Questions** (to be asked after household roster and before first expenditure section)

You said that [Read roster names] all live in your household. I'd like to spend a few minutes talking about ways they spend their money. This will help us move faster later in the interview, and help you remember things that you might otherwise forget since it's not an expense you had yourself.

To start, I want to ask about expenses that the other people in your household have that you may not. For example, one person might buy all the clothing for the family, while another handles all the vehicle expenses.

Are there some types of things that [name1] spends money on that you don't?

1. Are there some types of things that [name2] spends money on that you don't?
2. Are there some types of things that [name3...] spends money on that you don't?

Now I'd like to ask some other questions about people in your household. Again, this information will help us move through the survey faster and I'll use your answers later in the interview to remind you to include these types of things as you answer.

3. Do other people in your household have any hobbies or activities they like to do?
4. Have other people in your household taken any vacations or trips without you last year?
5. Has anyone in your household bought anything unusual or out of the ordinary in the past three months?

- *For each question, the expenditure category will be probed enough to identify the relevant CEQ subsection for the expense, and the name of the household member, but detailed expenditure information will not be collected*
- *For each CEQ subsection identified, a flag will be placed in that section. The participant will be prompted to include other household members purchases in that section*

- *The CEQ will be asked in the current production order.*

### **Proxy Debriefing 1**

1. What did you think of those questions?
2. Do you think you were able to answer them accurately?
  - a. How well do you know how other people in your household spend their money?
  - b. Do you know the types of things they spend their money on generally?
  - c. Do you know the amounts of money they spend, generally?
  - d. Do you know exactly?
3. Did you find those questions too personal?
4. Do you think other people would find them too personal?

### **Proxy Flag for CEQ Questions**

*Proxy Probe [to be used in each expenditure subsection identified during the initial proxy questions]. It will follow the section transition (e.g. “Now I am going to ask about...”).*

When we started, you said that [name1] might have had some of these expenses. Please keep them in mind as you answer the questions.

- a. *Each identified CEQ subsection will be asked about following the probe*
- b. *If one of the reference period sections (6a, 8a., or 17) was identified, the probe will be added to the beginning of that section, and the experimental reference period will be used*
- c. *If some or none of the reference period sections were identified, the identified sections will be asked in conjunction with the reference period sections, following the order of the standard CEQ,*
- d. *CEQ interviewing will continue for 40 minutes. At that time, the CEQ portion of the study will end and the debriefing will be conducted.*

### **3. Recall Period CEQ Questions**

*The following sections of CEQ will be asked using the specified reference period.*

- a. *The full CEQ subsection will be asked with the changed reference period. All follow up questions for each expenditure report will be asked.*
- b. *CEQ interviewing will continue for 40 minutes. At that time, the CEQ portion of the study will end and the debriefing will be conducted.*

<u>Section</u>	<u>Expenditure</u>	<u>Reference Period</u>
6A: Major Appliances	Microwave, stove, range hood, fridge, dishwashers, garbage disposal, clothes washer, clothes dryer	12 months
8A: Home furnishings	Furniture (not decorative items, closet storage items, travel items or dishes)	6 months
S11 Owned vehicles	Purchased or acquired vehicles only	12 months
S17A. Subscriptions or memberships	All	6 months
S17B. Books and entertainment	All	3 months (same as current, focus on switch within section)

#### **4. Second Proxy Reporting Debriefing**

Ok, now I'd like to go back and talk about the questions you just answered. I'm interested in hearing your reactions to them, as well as hearing what you thought about as you gave your answers.

When we started, I asked a series of questions about other people in your household. The questions asked about their hobbies, trips, unusual expenses or ways they spend money that you typically don't.

1. Based on your answers to those questions, when we got to the sections about [*insert expenditure section with proxy probes*], I reminded you about purchases made by other members in your household.

- a. If I had not instructed you to remember their purchases, do you think you would have?
  - b. Did you include expenses from all other household members?
  - c. Do you think you included all the expenses they had?
2. I did not give that instruction for [expenditure category asked without proxy probe, if possible clothing or phones]. I just said [section transition] Let's go back and review those questions.
  - a. I asked about this list of items *show info book page*. Did anyone else in your household have any of these expenses?
    - i. Did you include those expenses in your answers?
    - ii. *If yes*: did you include expenses from all household members?
    - iii. *If yes*: do you think you included all expenses they had?
    - iv. *If no*: why did you not include other household member's expenses?
3. We're interested in helping people tell us as much as they can about expenses for all the members of their household. Do you have any suggestions for how we could have helped you report everyone's expenses more accurately?

## 5. **Reference Period Debriefing**

I want to change focus now, and talk about the other questions I asked about. I'll go through the categories one at a time and get your feedback.

<u>Section</u>	<u>Reference Period</u>
6A: Major Appliances	12 months
8A: Home furnishings	6 months
S11 Owned vehicles	12 months
S17A. Subscriptions or memberships	6 months
S17B. Books and entertainment	3 months

### 6A. Major Appliances

1. When is the last time you purchased one of the major appliances listed here [*show info book page*]?
  - a. And before that, when did you last buy a major appliance?
2. How often have you bought an appliance in the last six months? In the last year?
3. How easy or difficult was it to remember when you last purchased an appliance?

- a. How easy or difficult was it for you to remember the details of that purchase, such as the cost and date?
- b. How far back are you able to easily remember that you bought an appliance?
- c. How far back are you able to easily remember the details of those purchases?

#### 8A. Home furnishings

1. When is the last time you purchased furniture listed here *[show info book page]*?
  - a. And before that, when did you last buy furniture?
2. How often have you bought furniture in the last six months? Last year?
3. How easy or difficult was it to remember when you last purchased furniture?
  - a. How easy or difficult was it for you to remember the details of that purchase, such as the cost and date?
  - b. How far back are you able to easily remember that you bought furniture?
  - c. How far back are you able to easily remember the details of those purchases?

#### S11. Owned Vehicles

1. When is the last time you purchased a new or used vehicle?
  - a. And before that, when did you last buy a vehicle?
2. How often have you bought vehicle in the last three years? Last six years?
3. How easy or difficult was it to remember when you last purchased a vehicle?
  - a. How easy or difficult was it for you to remember the details of that purchase, such as the cost and date?
  - b. How far back are you able to easily remember that you bought a vehicle?
  - c. How far back are you able to easily remember the details of that vehicle purchases?

#### S17A. Subscriptions or memberships

1. When is the last time you purchased or renewed a subscription or membership listed here *[show info book page]*?
  - a. And before that, when did you have expenses for something listed here?
2. How often have you had an expense for one of these things in the last six months? Last year?
3. How easy or difficult was it to remember when you last purchased a subscription or membership?
  - a. How easy or difficult was it for you to remember the details of that purchase, such as the cost and date?

- b. How far back are you able to easily remember that you bought a subscription or membership?
- c. How far back are you able to easily remember the details of that subscription or membership purchase?

**S17B. Books and entertainment**

When is the last time you had expenses for any of the books or entertainment items listed here [*show info book page*]?

- a. And before that, when did you have expenses for something listed here?
2. How often have you had an expense for one of these things in the last six months? Last year?
  3. How easy or difficult to was it to remember when you last purchased something from this list?
    - a. How easy or difficult was it for you to remember the details of that purchase, such as the cost and date?
    - b. How far back are you able to easily remember that you bought something from this list?
    - c. How far back are you able to easily remember the details of that purchase?

**6. Overall debriefing**

1. Here’s a table showing the types of expenditures we just talked about. Please enter the time frame (e.g. one day, one year, five years) that you think you would be able to accurately remember purchasing that type of item, as well as the cost and month of the purchase.

<u>Expense Type</u>	<u>How long you think you can accurately remember</u>
6A: Major Appliances	
8A: Home furnishings	
S11 Owned vehicles	
S17A. Subscriptions or memberships	
S17B. Books and entertainment	

2. Do you have any final comments or suggestions as we work to improve our survey?