

# Report Calls

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## 7.1 Reporting to Your Supervisor

The report call is a scheduled exchange of expectations between you and your field supervisor and is a mandatory responsibility of being an NFS Field Test data collector. Both you and your supervisor will agree on a mutually convenient time. This call will require your full attention. During this time, your supervisor will focus entirely on you and your assignment. Your supervisor will expect the same of you. This is the time for both of you to concentrate on your progress, your problems, and your work plan for handling the remainder of your work assignment.

The format for your weekly call may vary from week to week focusing on the necessary topics. Your supervisor will also use email throughout the week to pass on information about some of these items. For example, your supervisor might send a message to point out an error in your timesheet. She will also confirm that you have received, read, and understood any emails sent directly to you from the Westat home office. Please reply to your supervisor when reading emails that require action so that he or she knows the message was received and acted upon.

Because there is usually a lot of information to cover, it is very important that you allow **1 hour** for the call, but be prepared for it to last longer if necessary. To be beneficial, the call needs to be unhurried and uninterrupted. The report call should be viewed as a contract between you and your supervisor to review all aspects of your workweek. If you are not going to be available at your scheduled time, it is your responsibility to contact your supervisor in advance and to arrange an alternate reporting time. Remember, your supervisor has other daily commitments, so a reporting time must be mutual.

It is important to have an appropriate setting for the call. Arrange to talk in a place where you have privacy and are free from the disturbances within your household. Sit at a desk, table or some other location where you can easily view the IMS on your laptop and sort through your paperwork. Also, have a notebook, iPhone and any other materials you may need available. Never plan report calls from your car or public location—this does not facilitate a productive exchange of information and may result in a loss of PII.

Agree on a time that will not interfere with your fieldwork to conduct this meeting with your supervisor. This should be a time when you are normally not working in the field, and you are free from family and social responsibilities—a time that you are available to conference with your supervisor undisturbed.

It is extremely important to complete all that is asked of you prior to the call so that you will be prepared and professional during this weekly meeting with your supervisor. The Interviewer Management System (IMS) is a key way to communicate with your supervisor and Westat home office about completed and pending work. Having an up-to-date IMS, including Electronic Record of Contacts (EROCs), will assist you greatly to have a productive and efficient report call.

Please remember that successful communication is the cornerstone to a good working relationship. Being prepared and on time for your scheduled report call, returning calls and emails, updating your IMS, and being candid about your schedule, and the difficulties you have encountered in general and with specific cases will enable the call to be more productive and allow your supervisor to provide recommendations that will be helpful.

You must set aside time to prepare the information regarding your cases for this important weekly call. Your supervisor will expect you to be organized with all the pertinent information that will be discussed. Prepare immediately before the call or the night before. The amount of time you will need for preparation will depend on how well and up-to-date you have kept your notes and case records during the past week.

Before the call, assemble the following:

- Any other paperwork associated with your assignment; and
- Any notes or questions pertaining to your assignment.

## 7.2 The Call Structure

Your call will generally include the following:

- Weekly news.
- Case-by-case review including:

- Number of completed cases;
- Disposition status of each pending case; and
- Specifics of problem cases.
- Planning strategy.
- Cost reporting including:
  - Hours;
  - Local miles;
  - Long distance miles (if applicable);
  - Local expenses (total expenses less the value of miles); and
  - Long distance expenses (if applicable).
- Feedback on quality, cost, and production.

Each topic may or may not be covered weekly and some topics may overlap. Your supervisor will set the agenda. Please be prepared with all topics for each call.

Overall, your supervisor is responsible for overseeing your data collection efforts, coordinating your assignments, assisting you with problems in the field, and helping you perform your assignments efficiently and effectively. The two of you are a team!

The purpose of the weekly report call is twofold. First, you will inform your supervisor of your progress and any general or specific issues, questions, or problems that you have encountered. Second, your supervisor will provide assistance in the form of guidance, specific instructions, and feedback on how you are carrying out your assignments. This call is the opportunity for you and your supervisor to keep each other up to date, and work in collaboration to successfully perform NFS Field Test data collection.

Here are some items that may cause concerns for your supervisor:

- Incomplete and inaccurate data collection;
- Unusual numbers of contact attempts with limited results;

- High rates of refusal and other nonresponse cases;
- Broken appointments;
- Spreading out your work, rather than working efficiently;
- Poor recordkeeping;
- Repeated and/or continuous unavailability for work; and
- Failure to enter/update EROCs.

If you find yourself exhibiting any of these behaviors, please improve your performance before your supervisor brings it to your attention.

## 7.3 Planning Strategy

Deciding on a course of action for the upcoming week is a critical part of the call. Think about a plan before the call and then present it to your supervisor. Your plan must be realistic and meet with your supervisor's approval. Your supervisor will expect you to focus on specific actions of your plan, not on generalities or wishful thinking like "I'll do better this week" or "I'll have more time to spend in the field."

As you develop your plan, consider the number of interviews you will be likely to complete over the next few weeks. Then, inventory your NFS Field Test supplies. If you anticipate running short of certain data collection materials, place your order with your supervisor to allow the Westat home office sufficient time to process and ship your supply request.

Before agreeing to a plan, your supervisor must first know your schedule.

- What days and hours will you work?
- What time of the day?
- When and where are your appointments for next week?

You and your supervisor can then build a plan for completing the remaining cases in an effective manner. You can discuss straggler cases and best approaches. Please always try to keep your commitments. If you let your supervisor know that you will work Monday, Wednesday, and Friday, she will expect to see production including IMS and electronic

timesheet entry updates for those days and a record of time recorded in MyDay from your iPhone. If your plans change, keep your supervisor informed and present a new plan.

After making your first initial contact, you will find that there is no standard formula for quick production. After studying your case assignment, you, together with your supervisor, will be able to figure out the best path forward. Keep in mind that as a data collector, you must be proactive in order to complete the case assignment—rarely will respondents initiate contact on their own.

## 7.4 Cost Reporting

As part of the weekly call, your supervisor will ask you about time and expenses. The NFS Field Test study has a tight budget. We have an obligation to collect high quality information as efficiently as possible.

All entries must be up-to-date on your IMS, electronic timesheet, Field Expense Report (FEF), and, if you were on travel status, your Trip Expense Report (TER). MyDay time you log on your iPhone can help guide you and inform you of the hours you worked as well as mileage traveled. In addition to reviewing your current reports, your supervisor has cumulative reports, as well as comparative reports from other interviewers on hours, expenses, and costs per complete. These reports list all interviewers within your region and provide information for assessing your costs relative to others in your region. When reviewing your costs, your supervisor will also take into consideration the demands of your assignment.

Be prepared for the following questions:

- Are you working enough hours to complete the assignment? As a guide, you should be working a minimum of 6 hours a day each day you are in the field and no fewer than 20 to 25 hours per week when work is available.
- Of the total number of hours, how many are actually spent in the field?
- How much travel are you doing? Are you clustering your cases as efficiently as possible or are you making repeated trips to same area? Cost per completed case is very important to the continued success of the NFS Field Test. Always keep cost and your work schedule in mind when scheduling appointments.

- Your particular situation and your caseload will have its own set of challenges. Always refer to your supervisor when you have questions about how to best set weekly goals and work your cases.

During the data collection period, it is our goal to maximize the first part of the field period and complete as much work as quickly as possible. We would like to see you, as a data collector, making contacts, setting appointments, and completing as many cases as you can as soon as you complete training and are certified to begin data collection.

## 7.5 Being One of NFS Field Test Finest

The NFS Field Test is a complex study with many procedures and activities to conduct. The following list summarizes much of what is expected of you as a data collector on this project. Please refer to this list throughout the field period and ask yourself whether you are doing these important tasks.

- Read each question precisely as it is worded and follow all project procedures. The rules we have in place are there to ensure accurate, efficient data collection. If you have suggestions for improvement, talk with your supervisor. But don't change anything without prior approval.
- During the administration of the CAPI interviews and the training of households to complete the Food Log, closely follow the NFS Field Test study protocol. Make sure you make every effort to correctly administer the data collection steps, accurately document the results, and always use your judgment to maintain safety.
- Work as efficiently as possible. Cluster your cases. Review all your work for a particular area so that if you have a broken appointment, you will still be able to perform other field-related activities, such as setting appointments.
- Add EROCs to update your interim disposition codes in mFOS and the IMS every day that you work.
- Pickup email and BSM messages regularly.
- Make certain your time and expenses are correctly entered each day you work. If you are working a partial week due to vacation, please complete all your entries on the last day you work in that week.
- Be prompt and prepared for report calls with your supervisor. Supervisors like to spend time hearing about how your week is progressing and how they can help you. Time spent on missed calls and shuffling papers is a waste of time.

- Enjoy your job. While this Field Test is challenging, interviewing on this project is rewarding. Be proud of your work.

## 7.6 Indications of Poor Performance

While this manual informs you about the NFS Field Test data collection procedures you are to follow, there are always a few people who “just want to be sure” and ask for a list of things they should not do. So, if you find yourself engaged in any of following, please correct yourself before your supervisor brings it to your attention.

- Incomplete and inaccurate data collection and NFS Field Test forms;
- Not following the CAPI administration protocol of reading verbatim and probing according to study protocol;
- Poor demonstration of data collection skills during observations;
- High hours per complete;
- Few hours worked on weeks when there are plenty of cases available to work;
- Working inefficiently, e.g., by not clustering cases; working less than 6 hours in the field when work is available; not following up on leads as appropriate;
- Missed report calls and overall poor communication;
- Broken appointments;
- High nonresponse;
- Not discussing or reporting problem cases with supervisor;
- Poor recordkeeping including not consistently using MyDay on your iPhone while working;
- Not updating EROCs in MFOS and the IMS;
- Not keeping your supervisor informed of changes in your availability to complete your assigned cases;
- Breach of confidentiality; and
- Lack of professionalism.

