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European Social Survey
Round 8 (2016-2017)

ESS INTERVIEWER BRIEFING: NC MANUAL

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ESS8 INTERVIEWER BRIEFINGS:
NC MANUAL

European Social Survey

0. Introduction

The European Social Survey (ESS) relies heavily on the quality of its interviewers' work. The Core Scientific Team (CST) therefore asks that interviewers who work on the ESS are experienced, trained in general interviewer tasks, and briefed in-person (i.e., during a live, face-to-face briefing session) about their specific task for ESS.

As of ESS Round 8, the CST provides **three main materials** to be used in the context of interviewer training and ESS briefing. They are:

1. The Interviewer Manual
   which contains all guidelines that interviewers should follow for ESS8 and which should be made available to the interviewers for reference,
2. The Briefing PowerPoint Presentation
   which NCs and/or survey agencies should use as the basis for their ESS8 briefing, and
3. This NC Manual
   which is the main source of information that NCs need in order to understand and follow the CST's guidelines on training, briefing, and following up on interviewers.

This NC Manual has **five functions**:

1. It emphasizes and illustrates the importance of training and briefing.
   → Chapter 1, 'Why interviewer training and briefing is important'
2. It outlines the content that should be covered in training and briefing.
   → Chapter 2, 'Content of training and ESS briefing'
3. It details how NCs should adapt the Interviewer Manual and the briefing PowerPoint.
   → Chapter 3, 'Preparing for an effective briefing session'
4. It explains the teaching approach that is recommended for the briefing session.
   → Chapter 4, 'Holding an effective briefing session'.
5. It summarizes your tasks related to training and briefing the interviewers.
   → Chapter 5, 'Summary: NC tasks in relation to interviewers'.

REMINDER: WHAT THE SPECIFICATIONS SAY ABOUT ESS INTERVIEWERS

- Interviewers must be experienced in doing face-to-face interviews. They must have received general training on face-to-face interviewing beforehand, you must brief them in-person on how to work for ESS8, and they cannot work on more than 48 cases.
- The ESS emphasizes interviewer training and briefing to ensure optimal comparability across countries.
- NCs play a key role in the design and the delivery of face-to-face fieldwork briefings. The survey agency is in charge of providing interviewer training and briefing.
- A substantive change in ESS8 is that more attention will be given to standardised interviewer training and briefing than in previous rounds. The CST will provide a series of pre-structured slides and related materials to be used as the basis for briefing sessions. Each key part of the briefing will be outlined with the explicit expectation that the NCs will then adapt it to their local circumstances.

The actual guidelines for interviewers are in their Interviewer Manual. This NC Manual will help you and the survey organisation understand and teach these guidelines.

1. Why interviewer training and briefing is important

1.1. In short

Interviewers are often the only channel through which participants in the European Social Survey (ESS) interact with the researchers behind the survey. The interviewers therefore have a **crucial role**. They are responsible for persuading respondents to participate, for making sure that respondents remain motivated and understand what is expected of them, for conducting interviews in a standardised manner, and for accurately reporting on all steps of the data collection process. The quality of the interviewers' work can thus have serious consequences in terms of survey reliability and validity.

Anyone who is responsible for the selection, training, and monitoring of interviewers knows that some interviewers are systematically more successful than others. As shown in the box on the right, **studies on ESS data have revealed interviewer-related variance** in a range of process and output characteristics. On each of these outcomes, the results obtained by the same interviewer are more similar than those obtained by different interviewers. So, the data show internal homogeneity (within one interviewer) but external heterogeneity (in comparison to other interviewers).

To **reduce interviewer related error**, interviewers must perform their tasks in a standardized manner, i.e., according to the same basic task rules which have been set by the CST based on the latest research insights. Proper training and briefing are the main ways to get interviewers acquainted with these rules. Countries that participate in the ESS should place appropriate emphasis on the interviewer briefing and training process in order to reduce the risk of problems with data quality and comparability. Experience may further help improve the quality of the interviewers' work, as evidenced by research on data from different surveys (Jäckle, Lynn, Sinibaldi, & Tipping, 2010; Lipps, 2007; Pickery & Loosveldt, 2000; Vassallo, Durrant, Smith, & Goldstein, 2015). This is why the ESS prefers countries to work with experienced interviewers.

INTERVIEWER EFFECTS IN THE ESS

Interviewer effects have been found on:

- participation rates and rates of successful contact attempts (Blom, de Leeuw, & Hox, 2011),
- answers on attitudinal and factual questions (Loosveldt & Beullens, 2014),
- item nonresponse (Philippens & Loosveldt, 2004; Japec, 2005),
- interview speed and length (Loosveldt & Beullens, 2013a; Loosveldt & Beullens, 2013b; Japec, 2005),
- response styles (e.g. straight-lining, see Beullens & Loosveldt, 2013),
- the association between indicators of latent constructs (Beullens & Loosveldt, 2014).

1.2. The important role of interviewers in different fieldwork steps

A key component in ensuring survey quality is minimizing non-response bias. The ESS sets a minimum response rate of 70% and a maximum non-contact rate of 3% in order to achieve this, and all non-response and non-contact is evaluated to detect possible bias. Another key is standardized interviewing. These three keys - obtaining good response rates, providing data for non-response analysis, and standardized interviewing – are in the hands of the interviewer.

1.2.1. At the doorstep

It is generally accepted that the interviewer plays an important role in obtaining the respondent's cooperation and that the manner in which the doorstep interaction occurs is crucially important. Groves and Couper’s (1998) conceptual model for survey cooperation states that **the doorstep interaction is the only factor that has a direct impact on the respondent's decision** on whether or not to cooperate. All other factors, such as the general survey climate, the respondent's characteristics, the neighbourhood, and the subject of the survey may well influence the interaction but they have no direct impact on the respondent's decision. The quality of the doorstep interaction is therefore crucial in obtaining cooperation. This interaction consists of (1) an introductory phase and (2) a persuasion phase.

Only the very first sentences used at the doorstep – i.e., the information that the interviewer mentions during **the introductory phase** – generally follow a somewhat fixed scenario:

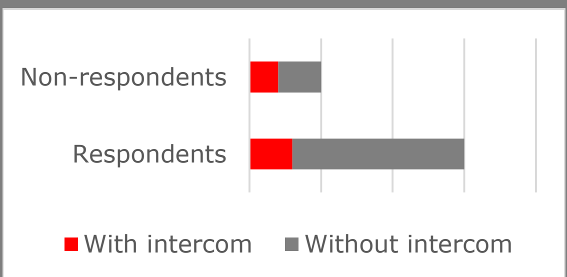
- the interviewers state their name and the survey organization they work for,
- then they check whether they are at the right address and talking to the right person,
- then they briefly explain the reason for the visit, perhaps showing their identity badge. If an advance letter was sent, the interviewer can refer to it and repeat the purpose of the interview in a single sentence.

ESS6 REFUSAL BY ‘GUARDIANS’

The prevalence of refusal by household members other than the respondent or by unidentified household members is quite high. In ESS6, on average **34% of all refusals** were not made by the respondent themselves but by ‘gate-keepers’ or ‘guardians’.

ESS7 NON-RESPONSE BIAS: INTERCOM

The bar chart below illustrates how in one country, the group of people with an intercom is overrepresented in the group of non-respondents in comparison to the group of respondents. This pattern is typical for most of the countries participating in the ESS.

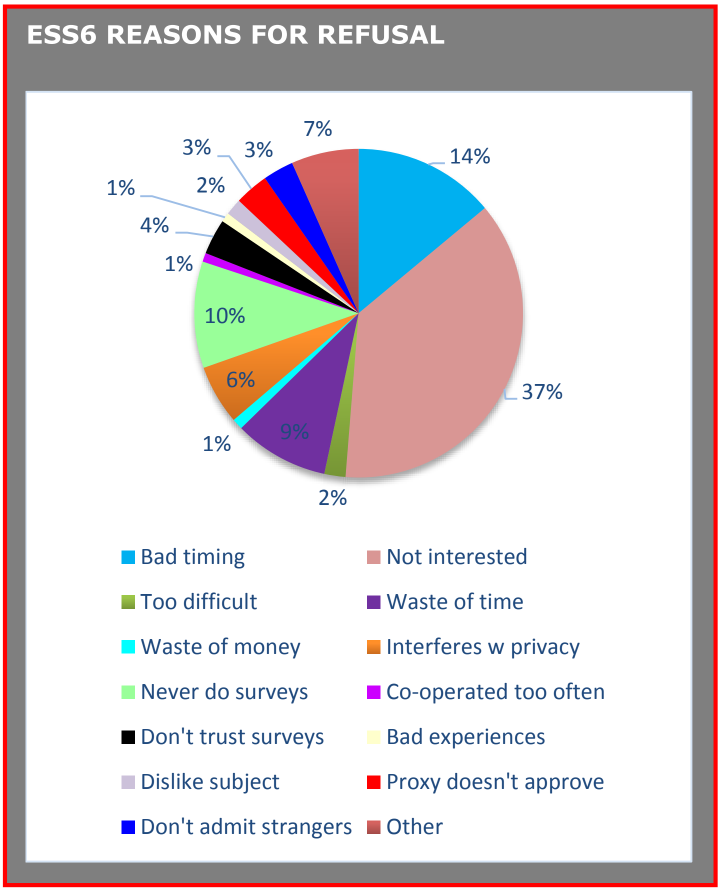


The main challenge for interviewers during the introductory phase is to get past ‘gate-keepers’ or ‘guardians’. These are household members who may refuse on the respondent’s behalf (in samples of named individuals) or who may refuse to list all eligible household members (in address-based samples). It is important that interviewers are trained to deal with such situations in a way that is appropriate for the person involved (see ‘tailoring’ in the next paragraphs). They should explain the reason for the visit in a reassuring way to avoid losing respondents early on. This is also important for getting past doormen, who could contribute to a higher noncontact rate if they refuse the let the interviewer enter. Another challenge is to get past intercoms (entry phones). It is often easier for respondents to refuse through the intercom than face-to-face. Interviewers should limit the time spent talking over the intercom, for instance by asking for face-to-face contact in order to show their identity badge. Both examples of the prevalence of issues like these (in the box on the left) point to a need for further training on getting past hurdles that can result in early refusals.

As soon as the right respondent has been reached and the interviewer has introduced him or herself, **the persuasion phase** can start. While it may be hard to think positively in countries that have low response rates, it is always best if the interviewers assume that the sampled individual will want to cooperate. The literature describes different techniques for obtaining this cooperation. One thing that they all have in common is that, contrary to the high level of standardisation that is required during the actual interview, they emphasize the need for the doorstep interaction to be **adapted to the respondent's situation and characteristics**. The 'leverage-salience' theory (Groves, Singer & Corning, 2000), for instance, assumes that different people attach a different degree of importance to various aspects of cooperating in a survey (e.g., the survey's subject, its purpose, the length of the interview, any incentives).

It is thus up to the interviewer to find out to which aspects the respondent attaches the most importance, and to emphasize those aspects when asking for cooperation. During their training, interviewers should therefore learn to distinguish different types of potential respondents and to react spontaneously and appropriately to their possible concerns. This is a matter of learning to adapt rather than sticking rigidly to a script. The fact that the doorstep interaction should be tailored means that interviewers should not be allowed to use more than a few key words during the persuasion phase. Still, as an NC, you could evaluate contact forms to **identify the reasons for refusal that are the most frequent in your country**, and emphasize their possible remedies to make sure that your interviewers have enough strategies to work with. These possible remedies are covered in the briefing PowerPoint sides.

Most potential respondents decide rather quickly, without pondering too much, whether or not to participate. Still, within this short process, there are essentially two ways of thinking that can both be at play when respondents decide whether or not to participate: (1) a heuristic decision making process, in which some general societal rules of thumb are applied (Groves, Cialdini and Couper, 1992) and (2) a systematic decision making method, in which the costs and benefits of participating are evaluated and weighed against each other. In consequence, at the doorstep, interviewers should be prepared **to minimize possible costs, to emphasize relevant benefits, and to take into account the heuristics** that are relevant in the context of the ESS survey. The training materials help them to do so, even if the respondent only mentions factors as a quick excuse.



Through the briefing PowerPoint presentation and the Interviewer Manual, the interviewers are taught strategies to address the following costs, benefits and heuristics. This is done interactively, without making the interviewers digest the theory behind the strategies.

- **Costs**:
  - A possible cost is giving up activities that are in progress, such as cooking, meeting with friends or taking care of children. Among the reasons for refusal in ESS6, 14% were related to such bad timing. Interviewers should be taught to notice verbal as well as non-verbal signs of reluctance so they can withdraw and come back later. **Obtaining an appointment is always better than obtaining a refusal.**
  - Other costs are related to fears: a fear of losing time to something useless (9%), of losing face (2%), of privacy invasion (6%) or of allowing strangers in (3%). If deemed helpful, interviewers should introduce themselves using an advance letter and a badge to avoid suspicion, and they should put the respondent at ease by emphasizing that the survey is not difficult, that there are no wrong answers and that respondents can call a halt to the interview if they feel like it. The fact that the data will be anonymized is also crucial. It can help if you provide leaflets with ESS results on accessible topics such as TV watching to illustrate how the ESS, without identifying anyone, describes the population's habits and attitudes rather than its factual knowledge.
  - A final group of costs is related to negative attitudes towards surveys or the ESS. Many respondents say that they never participate in surveys (10%) and some feel that they have participated in surveys too often (1%). Respondents may also find the ESS irrelevant or they may consider the topic too vague or not interesting (37%). Interviewers should try to figure out (based on, e.g., sex, age and domestic circumstances), which topics are likely to be of most interest to the respondent. As such they can mention those to illustrate what makes the ESS unique and relevant. Again, you could equip NCs with an overview of some ESS results. Interviewers can also point to the large number of data users to demonstrate the relevance of the ESS.

- **Benefits**: the interviewer can emphasize to potential respondents that participating in the ESS is a unique experience, useful and meaningful, a good opportunity to get their opinion heard, an escape from the everyday routine, and/or a big help to the interviewer. Of course, interviewers should be taught to only mention such benefits if they seem **relevant**. Saying that the ESS would be a nice escape from the respondent's everyday routine, for instance, will only work well with potential respondents who are rarely busy.

- **Heuristics**: the interviewer should take into account the possibility that the respondent applies the following rules of thumb. This should always result in **positive actions**, never in negative ones (such as emphasizing negative consequences of not participating).
  - Mutuality: friendliness is often met by friendliness, while a pushy or patronizing attitude will probably give the interviewer a dressing down.
  - Sympathy: people do not want to disappoint someone they like. This is another reason why interviewers should try to establish rapport with the respondent by showing professional friendliness.
  - Authority: some respondents are more inclined to cooperate if a study is commissioned by a reputable institute (such as a university) or the government. The interviewer can mention this. However, note that an overly authoritarian attitude can have adverse effects and that some respondents can actually dislike the institute or government.

- Scarcity: most people want to take advantage of unique or scarce opportunities. Interviewers should emphasize the uniqueness of the opportunity to be heard through the ESS.
- Social validation: people often attach great value to the sense of belonging to a group, and therefore conform with how the other members of the group behave. The interviewer can play this out by mentioning, for instance, that most respondents have been willing to participate and have enjoyed taking part in the survey.
- Consistency: people generally want to be coherent: once they have given a negative response to the request to cooperate, they will want to stick to it. This means that the respondent should not be given the opportunity to respond in a negative manner or to repeat negative arguments. It has indeed been shown that interviewers who avoid asking 'why' after an initial refusal often obtain better response rates (Japec, 2005). It is better to give immediate arguments in favor of cooperation and to first ask the respondent a couple of smaller initial questions (such as 'how long have you lived here?'). This will create a foot in the door in the form of a 'history' of cooperation that the respondent may want to continue.
- The power of numbers: rather than listening carefully to the content of what is being said, people often count arguments. Therefore, suggest to interviewers that they line up more positive arguments than negative ones to tip the balance.

Again, this is a structured list of factors that **should not be approached theoretically** during the interviewers' briefing. The section above is mainly important for the person doing the briefing, to understand the logics behind possible doorstep scenarios. Instead, practice realistic scenarios with the interviewers, and confront them with the main reasons for refusal given in the ESS so they can see the relevance of practicing certain doorstep scenarios.

KEYS: TAILOR + MAINTAIN INTERACTION

Tailoring is crucial in the process of obtaining cooperation. This implies that maintaining interaction is equally important. When the interaction is too short, it is not possible for the interviewer to find out which arguments are relevant for the respondent (Groves & McGonagle, 2001). Interviewers should be taught to keep interacting with potential respondents, and if this is not possible, to retreat before obtaining a refusal.

1.2.2. While reporting on the contact procedure and observable information

Interviewers are not only expected to convince respondents to participate. They should also provide a good basis for an evaluation of non-response bias. Researchers agree that an adequate analysis of nonresponse can only take place if (1) the data that it is based on are available for all sample units, (2) the forms' design and (3) their implementation is equivalent across all countries/cases, and (4) if coding rules are also equivalent and followed perfectly across all cases (Blom, Lynn & Jäckle, 2008). In order to **obtain a good basis for assessing nonresponse bias** that corresponds to these requirements, the ESS places great emphasis on the collection of contact data and information about the respondents' home and neighbourhood. These forms, to be completed 'on the spot' by the interviewer, deliver data that allow for response rates and non-response bias to be calculated and assessed. Also, patterns in the information about non-contacts, ineligibles, refusals etc. can point to procedures that can help improve the response rates in future ESS rounds or even during fieldwork.

In other words, accurate and complete data about the contact procedure and the sample units' home and neighbourhood are vital to monitoring and improving the ESS data quality. Interviewers have a crucial role in obtaining these data. However, the previous rounds of the ESS have brought to light **some frequent issues with the quality of these forms' data**.

CONTACT FORMS

For every selected sample unit (response as well as nonresponse units), the contact form should document all attempts to make contact.

FORMS FOR OBSERVABLE DATA

For every selected sample unit, the interviewer should answer five questions about the dwelling and its immediate neighbourhood once, preferably during the first visit and during the daytime.

The function of the ESS **contact forms** is to document all attempts to make contact with every selected sample unit. Throughout the previous rounds of the ESS, several frequently occurring issues with the contact data have come to light.

- Missing information. For instance, if the outcome is 'refusal', reasons for refusal should be given and if the outcome is 'language barrier', the respondent's mother tongue should be listed. Such problems can easily be solved by proper routing in the CAPI programme if the contact forms are computer based. Furthermore, it should be emphasized that all contact attempts must be listed, not only those that lead to actual contact.
- Redundant information. If the outcome code is 'no contact', for instance, it does not make sense to list refusal reasons. Such redundant information often points to inaccuracies.
- Incorrect or misplaced information. The day of the week (question 2) should match the interview date (question 1), all visits should be listed in chronological order, etc. This, again, is a matter of allowing the interviewers to get used to using the contact forms during their briefing session and emphasizing those issues that occur the most often in your country.

The registration of **information about the home and neighbourhood** of each sampled unit is a rather unique aspect of the ESS. Previous analyses have demonstrated that neighbourhood characteristics differ significantly by type of respondent (initial refuser or non-contact) and that based on this type of information, it may be possible to correct non-response bias (Stoop, Billiet, Koch, & Fitzgerald, 2010). The ESS7 quality reports recommend to several countries that they adopt a responsive fieldwork design, targeting additional contact or refusal conversion attempts at the type of households that are underrepresented. Unfortunately, just like the contact data, the observable data have been subject to some problems. Analyses have revealed these three main problems:

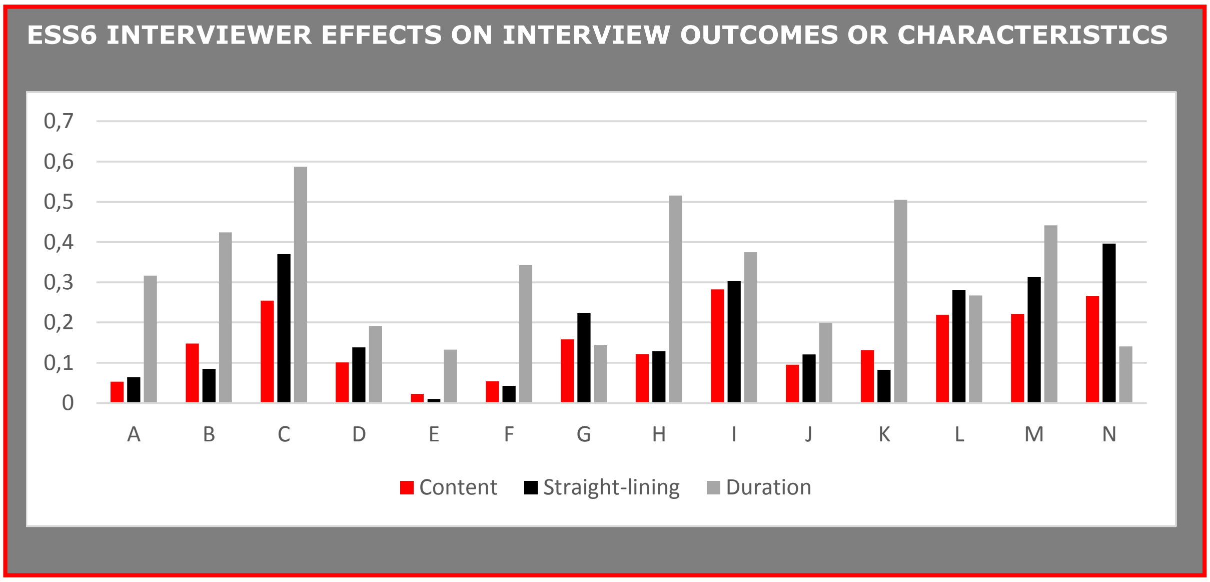
- Large amounts of missing data, in particular for nonresponse units. It is essential that this information is collected for every sampled unit (except invalid addresses), so even for desk rejections (if those exist in your country).
- Inexplicable cross-interviewer variation in the data. It seems that the interviewers' assessment of, for instance, the homes' condition may be influenced too much by their own perception. Briefings using appropriate pictures should teach to assess homes and their neighbourhoods in a more standardised manner. The interviewers should be taught to compare the home to the pictures and descriptions in their Manual, rather than to their own definition of what, for instance, a 'large amount' of litter is.

- The impact of interviewer burden factors on the quality of the observable data. It is important that the interviewers' workload is limited. Countries should adhere to existing fieldwork protocols (e.g. a maximum of 48 assignments per interviewer).

It is important that subsequent rounds of the ESS tackle these issues. An important step towards improvement are the new briefing sessions, which should contain a discussion of contact scenarios and pictures of homes and neighbourhoods. The fact that, in recent rounds, the quality of the observable data has increased (less missing data, less cross-interviewer variation) along with the introduction of pictures for briefing on this topic (Matsuo & Loosveldt, 2012), suggests that a more thorough and standardised briefing is indeed crucial.

1.2.3. During the interview

To obtain high quality datasets in a comparative survey like the ESS, it is essential that all interviewers perform their task in a standardized way, applying the same basic task rules during their interaction with a respondent, and putting in the same efforts to obtain adequate responses. These basic task rules are explained in the Interviewer Manual. The goal of such **standardized interviewing** is that differences in the answers of respondents reflect differences between respondents' attitudes rather than differences in how they were asked the questions or how their answers were recorded. When interviewers behave differently, in terms of how they ask a question, react to the respondent, or record the respondent's answer, 'error' is introduced to the data and can affect the results of the survey (Fowler & Mangione, 1990).



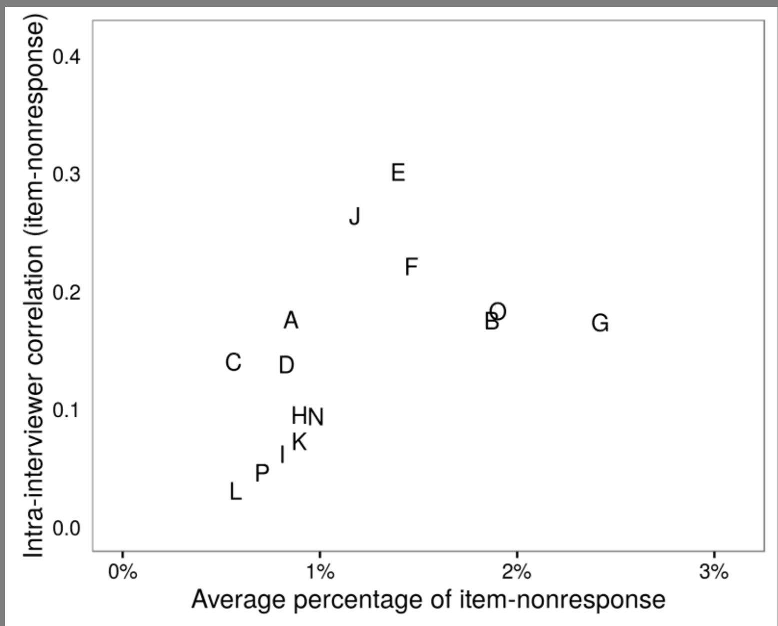
Analyses on data from previous rounds of the ESS have **revealed interviewer effects on a range of outcomes** related to the interview itself. Some of these effects that were found in ESS6 are shown for a random selection of 15 anonymised ESS6 countries in the box above. The graph shows the intra-interviewer correlation on three outcomes: the respondent's answers to 51 attitudinal questions, the extent to which they straight-lined, and the duration of the interview. This correlation expresses the proportion of variance that is explained by the interviewer. The larger the intra-interviewer correlation, the higher the proportion of the total variance that is explained by the interviewer, i.e., the bigger the systematic differences between interviewers. This means that in an ideal world, the intra-interviewer correlation is zero on each outcome. However, the graph above shows that the interviewer variance is hardly ever negligible: at least one outcome is subject to interviewer effects in each country. For instance, up to 30% of the content of the respondents' answers may merely be interviewer noise, and up to 60% of the differences in interview length are related to the interviewer.

In order to **tackle existing interviewer variance**, the interviewers should be made perfectly familiar with the ESS interviewing guidelines. A thorough discussion of effective reactions to 'inadequate' respondent behaviour is also an essential part of the training (Loosveldt, 2008). Interviewers should furthermore be allowed to practice doing the interview during their briefing session. The person in charge of the briefing should then check, for instance, whether all questions are read with an appropriate pace and intonation and exactly as written, without additional information, suggestions or definitions. **The rules that are taught should match the rules in the Interviewer Manual; even if they do not match the rules that are generally taught by the survey agency.**

Note in the graph above that some countries' training seems to have resulted in less country-level standardisation than others', but also how some countries experience strong interviewer effects on one outcome, but much less on other outcomes. As an NC, take a close look at the quality reports that you have received from the CST and emphasize those outcomes that are subject to substantial interviewer effects during your training. If, for instance, you notice strong interviewer effects on interview length, work on an appropriate reading pace, not allowing the interview to digress, and limiting probing to what is allowed (if anything, depending on the question). Keep in mind that differences between interviewers are not necessarily restricted to the three outcomes plotted above. Interviewer effects can also occur on, for instance, item non-response and participation rates (see the references in the box on page 2 and the graph in the box on the right).

ESS7 INTERVIEWER EFFECTS ON ITEM NONRESPONSE

Another example of the important role of interviewers: The fifteen first-release ESS7 countries are represented as random letters in this graph that links their interviewer effects on item-nonresponse to their average percentage of item-nonresponse. In some countries, a considerable proportion of the nonresponse is related to the interviewer.



2. Content of training and ESS briefing

The ESS distinguishes between two major components of interviewer preparation for fieldwork:

- **Training is task-specific: 'how to be a good face-to-face interviewer'.** It is expected that all interviewers have been trained (and have gained experience) before they are briefed to work on the ESS.
- **Briefing is project-specific: 'how to be a good interviewer for the ESS'.** It is expected that all interviewers are briefed in-person using the PowerPoint and Manual provided by the ESS CST.

TRAINING VS. BRIEFING

A proper training session teaches interviewers how to obtain cooperation for face-to-face surveys and how to do a standardised interview.

A proper briefing session ensures that the interviewers have learned and practiced everything they should know about interviewing for the ESS in particular. Tasks that are very specific to the ESS are, for instance, being able to explain the topic and purpose of the ESS, being able to deal with ESS questions that are known to be more 'difficult', and filling out contact forms and collecting observable data.

2.1. General training

In the ESS, it is assumed that interviewers have been trained before they are asked to work on the ESS. This means that in most cases, the NC and CST cannot influence the content of the training and the approach to it. However, survey researchers agree in general about the content of interviewer training and the **NC should verify that this content has been covered during the training procedure**. If not, an additional training session could take place, or a prolonged briefing session could go into the details of doorstep interaction and standardised interviewing.

STANDARDISED INTERVIEWING: THE ESS RULES

1. Never let the respondent see the computer screen.
2. Read slowly, clearly and with the correct intonation.
3. Read all questions in the correct order and exactly as written, in full. Also read all response categories except options between brackets.
4. Do not express your own opinion about the questions and about the respondent's answers.
5. Do not rephrase questions or provide clarifications.
6. Use the right showcards if necessary and give the respondent enough time to read them.
7. Let the respondent select a response: do not make assumptions or interpret previous information.
8. Accept 'don't know' and move on (unless otherwise specified).
9. Accept answers that seem to contradict each other.

During their training, interviewers must have gained insight in the essential characteristics of obtaining and conducting a face-to-face interview (e.g., the complexity of the interviewer-respondent interaction; differences between an interview and a conversation,…). In the end, interviewers should have a sound grasp of both positive and negative effects of interviewer behaviour on data quality. Positive effects are, for instance, persuading a respondent to participate; Negative effects are, for instance, having an impact on the respondent's answer.

The following two main activities should take place during the training session:
- addressing examples of how to deal with different types of respondents during **doorstep interactions** and practising different doorstep scenarios,
- discussing and practicing the rules of **standardised interviewing**, including a thorough discussion of effective reactions to inadequate respondent behaviour.

Note that interviewer training should be more than a theoretical presentation of the basic task rules. Practice and interactive discussion of best practice guidelines are essential. NCs should confirm with the survey organisation that all ESS interviewers have received such training. If, for instance, the training that the interviewers have received before lacked practice time or taught conversational interviewing rather than standardised interviewing, you must make time to remedy this before or during the ESS-specific briefing session.

WHICH INSTRUCTIONS?

Survey agencies and many interviewers have a considerable amount of previous experience. This means that they have probably developed certain habits in their approach to the doorstep and interviewing procedure. Make sure that the interviewers still adopt the rules in the Interviewer Manual. Have them checked carefully and emphasize any differences with 'regular' practice during the briefing session.

2.2. ESS-specific briefing

The briefing materials provided by the CST cover both essential and recommended topics.
As a basic requirement, **each briefing session must convey the following information:**
- General:
  - What is the ESS and what is its purpose?
  - The required response rate is 70%.
  - Fieldwork procedures: start and end dates, use of back-ups / incentives (if applicable), how and when to return work, who to contact with queries.
- At the doorstep:
  - Contact procedure: the first contact attempt has to be face-to-face (if applicable), plan at least four attempts over at least two weeks at different times (at least one at the weekend and one in the evening) as long as you have not obtained a final code.
  - Selecting respondents (if applicable).
  - Substituting respondents is forbidden.
  - Telephone interviews are forbidden.
  - When and how to fill out contact forms and forms about the home and neighbourhood.
  - How back-checks & refusal conversion will take place.
- During the interview:
  - Topics and structure of the ESS interview.
  - Additional information about specific questions (as included in the Interviewer Manual, e.g., the occupation questions, the household grid,…).
  - The ESS rules for standardised interviewing.
  - Information that must be provided to respondents before the interview starts.
  - Practice reading the questions using the example interview provided by the ESS CST.
  - The ESS data protection rules.

In addition, it is **strongly recommended** that the following topics are addressed:

- How to gain cooperation and do a standardised interview: an interactive discussion of realistic examples.
- Using identity badges, advance letters, leaflets and the CAPI equipment (if any).
- Practical arrangements: distribution of cases across interviewers, payment, etc.
- Findings from previous rounds of the ESS.
- ESS data usage.
- Obtained response rates and interviewer effects in previous rounds of the ESS.
- With experienced interviewers: changes since ESS7 and in comparison to other surveys.

The Briefing Powerpoint Presentation that is provided by the ESS covers all of the essential elements, as well as the strongly recommended ones.

3. Preparing for an effective briefing session

3.1. Planning your briefing sessions

It is recommended that briefings take place in **August 2016** so fieldwork can start in September (or in the month before fieldwork is expected to start in your country, if later than September 2016). The precise planning of briefing sessions in terms of timing and grouping is up to you and the survey agency. Note, however, that ESS8 briefing materials have been developed in such a way that they work well with groups that are **mixed in terms of experience**, and take about **six hours** (including lunch and coffee breaks) to be covered sufficiently. This is the minimum amount of time deemed necessary for a good briefing session, but it still leaves time for interviewers to go to the briefing session and to get home at a reasonable time. If you wish to extend the briefing sessions, you are encouraged to do so.

3.2. Preparing the briefing materials

As explained in chapter 1, the finding that interviewers introduce non-random noise in the ESS data has led to several initiatives, the basis of which is the hope that providing interviewers in all ESS countries with more standardized instructions and support will help achieve a higher level of consistency in interviewer practice. One of these initiatives is the development of **two new core materials** for interviewer briefing:

- A PowerPoint presentation to guide the briefings. This is a series of pre-structured slides and related materials to be used as the basis for briefing sessions.
- An Interviewer Manual. This Manual lists everything the interviewers should know about interviewing for the ESS. After the briefing sessions, interviewers should be given a digital or printed copy of the Interviewer Manual.

We hope that the new briefing materials will help to address inconsistencies between and within countries in terms of interviewer briefings and interviewer practice, achieving the highest quality fieldwork required by the European Social Survey. However, the materials are not meant to be translated verbatim without any **adaptation**. In both materials, each key part of the interviewers' task is outlined with the explicit expectation that the NCs translate this information and adapt it to their local circumstances. Indeed, factors such as the details of sampling, possible advance letters or leaflets, and pictures of homes and neighbourhoods can vary greatly across countries. Information about such elements should be tailored to the national circumstances.

USING OTHER MATERIALS

Feel free to add other briefing materials if you find them useful. Make sure, however, that they do not contradict the information in the Interviewer Manual. Any additional training materials (whether written or audio/visual) should also be uploaded to the NC intranet for reference.

It is strongly recommended that you use the briefing materials that are provided. If you are truly unable to use parts of the Interviewer Manual or of the presentation as they are, you should still base your own materials and your briefing agenda on the provided materials, to ensure that all essential topics are covered.

The materials can be prepared by you as an NC or by the survey agency, following these steps:

- **The Interviewer Manual:**
  - Use find/replace to replace [country] with your country and [nationality] with the matching nationality. For instance, if you are the Spanish NC, replace [country] with 'Spain' and [nationality] with 'Spanish'.
  - Use the find function to look for other square brackets. Select from within those brackets the information that is appropriate for your country, or replace the key word as needed.
  - Follow the instructions in the comment boxes.
  - Consider the pictures used to explain the categories in the form about the home and neighbourhood of the respondent. Are the pictures suitable for your country? If not, replace them, taking care that you adhere to copyright rules.
  - Read through the Manual. Is any information that was not pointed out as 'amendable' not correct for your country? Discuss any amendments that you would like to implement with your country contact or with the fieldwork team before you make any changes.
  - Translate the Manual to the appropriate language(s) for your interviewers.

- **The PowerPoint presentation:**
  - Follow the instructions in the comment field with each slide. These instructions are preceded by 'How to adapt this slide' (whereas instructions for actually using the slide are preceded by 'How to use this slide'). The instructions will be very similar to the instructions for adaptation that were in the Interviewer Manual.
  - Remove the text preceded by 'How to adapt this slide'. Leave the text that is preceded by 'How to use this slide'. Consider translating this text if you feel that the person doing the briefing is not sufficiently proficient in English. Alternatively, you can go over the instructions orally with the briefer.
  - The first slide is intended for authentic newspaper articles, radio broadcasts or clips from TV news. Have any findings from the ESS been in the media in your country? Please include them. If no or not enough examples are available, select some graphs from the source Excel file that we have provided for you. Select the most striking graphs and highlight your own country in them, for instance by choosing a different colour.
  - Subtitle the movie clips. We have provided pre-structured subtitle files for you that only require translating, no additional coding or timing. To translate, open the .xml files in Notepad. Translate the full sentences that end with </p>. Do not change any code in these files except for the full text, so: leave all text between the <heading> and <styling> tags intact as well as the timestamps per sentence. Note that you will need an add-on called STAMP to display the subtitles (see 3.4). Alternatively, you can dub the movie clips or re-record them with local actors/volunteers.
  - Have you replaced any pictures in the Interviewer Manual to introduce the categories in the form about the home and the neighbourhood of the respondents? Make sure that you use the same pictures in the PowerPoint presentation.

- **Other materials:**
  - Prepare the example interview which is appended to this NC Manual. Replace the core with your final translated questionnaire (following TRAPD procedures) and translate the example responses. Keep the guidance notes in English or translate them as well, depending on the language skills of the person doing the briefing.
  - Make sure to also bring paper copies of the contact form to the briefing session.

3.3. Preparing other materials for the interviewers

3.3.1. Badge

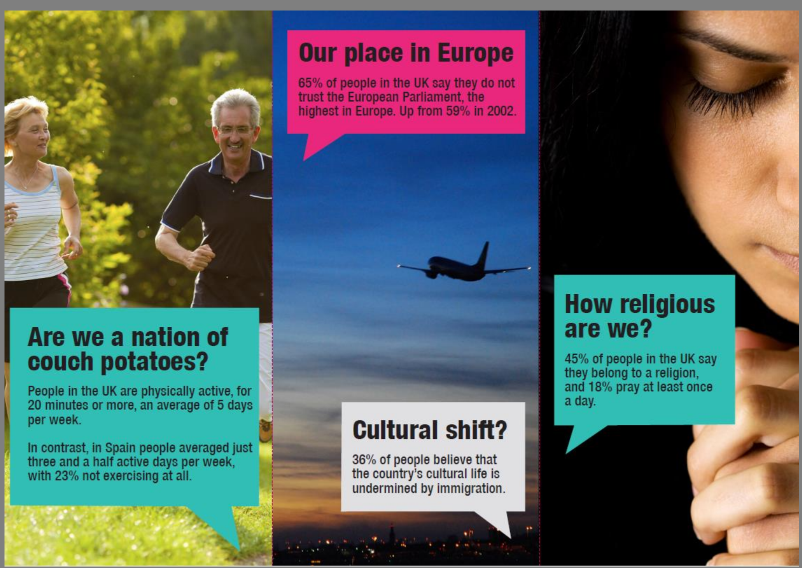
It may help if the interviewers have an identity badge with them. In many cases, the survey agency already has such badges available. If not, you could ask them to produce badges or do so yourself.

3.3.2. Advance letter and/or leaflet

You may like to produce an advance letter and/or a respondent leaflet, containing information about what the ESS is, why we want to speak to the respondents and who uses the results. Interviewers have found such letters or leaflets very useful in countries that use them. The advance letter is sent by the interviewer or the survey agency before the first contact attempt, but it is often useful if the interviewer has a copy of this letter with them. The leaflet can be used whenever interviewers feel it would be valuable - for example leaving it with someone who they are going to call back on later, or giving it to people who want to know more about the study. Information you could include:

- Why does the study matter – why should they take part?
- Topics included in the questionnaire
- How we have obtained the respondent's name/address
- Why we cannot substitute them with another respondent
- Who funds the ESS
- Confidentiality – what information will be available to whom?
- How long the interview will take
- Findings from Rounds 1-7
- A link to the ESS homepage or national ESS website where available

EXAMPLE: PART OF THE UK'S ESS7 LEAFLET



An advance letter template can be found on the ESS intranet. Examples of leaflets used by countries in previous rounds can be found on the ESS website. The ESS website also includes links to the 'ESS Findings Booklet' that includes selected findings from earlier rounds, and booklets showing findings from specific modules from previous rounds. If producing a leaflet, consider the audience carefully and ensure that the information is accessible to all.

3.3.2. Contact forms

It is strongly recommended to use the contact forms provided by the ESS. They have remained the same since ESS7 and should only be translated rather than adapted. **Take care when translating the contact forms** for ESS8, because an evaluation of the contact forms that were used during ESS7 has revealed some issues with incorrect translation. Incorrect translation of forms is a serious threat to data quality. It is also strongly recommended that you enter the contact forms into the CAPI programme (if you have one) and that you **check the routing thoroughly** against the routing that is shown on the paper form.

If using country-specific contact forms, ensure that all the information required by the ESS is included and that the interviewers receive correct instructions on filling them out.

3.3.3. CAPI programme

It is strongly recommended that you work with computer assisted personal interviews only. When preparing the CAPI programme, make sure that all routing is implemented as instructed and that the data protocol is followed. **The data protocol** is a crucially important document and guideline for you. Furthermore, where possible the CAPI programme should require an input before the interviewer can move on to the next question.

3.3.4. Showcards

The interviewers will need showcards to present possible answers to the respondents. While preparing them, keep in mind that with one or two exceptions the showcards must NOT contain the text of the questions. Where some or all of the text can be displayed this has been clearly indicated in the questionnaire. Furthermore, the options 'don't know' and 'refuse' should generally NOT appear on the showcard either. It may be helpful to your interviewers if you provide them with showcards that have been laminated and ordered in a binder.

3.3.5. Make sets of all materials per interviewer

As an NC, make sure that (the survey agency ensures that) the interviewers have all the materials needed to do the interviews. This includes the materials mentioned above as well as any paper forms, the laptop or tablet computer (if required), any incentives (if available) and so on.

3.4. Preparing the briefing room & equipment

If at all possible, opt for a U-shaped chair setup rather than a typical classroom setup.

You will obviously need a projector and a projector screen to display the PowerPoint. Depending on the screen size, remember to check and perhaps adjust the font size used in the graphs that are part of the presentation. Importantly, **the computer from which the slides will be displayed should have a PowerPoint add-on called 'STAMP' installed** for the subtitles to appear correctly. More information can be found at http://support.office.com: enter STAMP in the search box in the top right corner and choose the second link. It is always good to check its functioning, as well as the audio quality, well before the first briefing.

4. Holding an effective briefing session

4.1. Key principles behind the briefing approach

Quotes such as "Yet another briefing session?!" and "I have done so many interviews that there is nothing more to learn for me" may sound familiar to anyone involved in doing briefings. ESS briefing sessions are, however, **an essential way to prepare the interviewers for their tasks**. These tasks differ to some extent from other projects and some of them could probably be executed somewhat better, as illustrated above. Moreover, briefing sessions are an excellent opportunity to motivate the interviewers to do the best they can. It is therefore essential that the ESS briefing sessions tackle some of the interviewers' belief that they are uninteresting. They should be sufficiently engaging so that the interviewers become prepared and willing to do a good job.

The new briefing approach takes into account that no-one likes to spend hours listening to a lecture, and that most interviewers have attended many briefing sessions already. However, it also acknowledges that some interviewers may have less experience or may have adopted strategies that conflict with ESS rules. The new ESS briefing materials therefore come with the proposal that **the person in charge of the briefing acts as a coach** who (1) takes into account the fact that most ESS interviewers have quite some previous knowledge, but (2) can also identify and fill gaps in the interviewers' knowledge and skills.

WHY A RECOMMENDED APPROACH?

The new briefing materials are intended to decrease the interviewer effects that we see within countries, and to further standardize the interviewers' approach across countries. Because the aim is standardization, not only the materials, but also the teaching approach should ideally be highly similar in each participating country and in each session. The ESS CST therefore proposes that each country presents and uses the provided materials according to the same teaching principles. These principles have been shown to be effective in similar learning situations.

The new materials ensure that any **prior knowledge is**:

- **Acknowledged**: The briefing materials clearly acknowledge the fact that interviewers probably have previous experience and certainly have some common sense. It is well-known that, in learning situations, when individuals get the chance to demonstrate what they already know or do well, their motivation for learning increases, resulting in even better performance (Schunk, 1991). This means that we discourage a teacher-centred, deductive teaching approach in which the briefer conveys a list of rules to a passive audience. Such an approach may lower the interviewers' motivation, possibly making them overlook ESS rules that are new or different from other surveys.
- **Assessed**: The materials help trainers to determine, point out and fill gaps in the interviewers' knowledge or skills. This can ensure that the interviewers, too, become aware of aspects of their own practice that they can improve. Awareness of the relevance of a learning situation increases short-term motivation (i.e., for participating in the session) as well as long-term motivation (i.e., for applying what they have learned to their interviewing practice) (Wlodowski, 2008).

- **Used**: Using prior knowledge can help deal with the fact that, in many countries, briefing sessions may be attended by groups that are heterogeneous in terms of experience. A good way to differentiate and advance in such learning contexts is to let more advanced learners explain learning content to less advanced learners (Cohen & Lotan, 2014). This helps achieve the two criteria above (the interviewers' prior knowledge is acknowledged but can be assessed at the same time), while creating a more dynamic, authentic and inspiring learning atmosphere.

Another important aspect of the briefing materials is that they are designed to help overcome the feeling that many interviewers have that briefing sessions are boring. If used as intended, the materials should not only result in a more **engaging and lively briefing session**, but also in **more engagement towards the ESS** as a relevant survey that truly requires high participation rates and good data quality. We have tried to achieve this by working with prior knowledge (as stated above), but also by including audio-visual materials and by pointing out the important role of the ESS itself and of the interviewers collecting the data. While the latter components are not fully obligatory parts of your briefing, we therefore strongly recommend you keep them. After all, our priority is for interviewers to keep wanting to do a good job and keep improving their work.

THE TEST-TEACH-TEST PRINCIPLE

Test
- Let the interviewers give input so they feel acknowledged and you can assess their understanding of a certain task.
- Example: Show a movie clip in which an interviewer starts an interview. Ask what went well and what not.

Teach
- Let the interviewers point out things that their peers missed or got wrong. Moderate and add information as needed.
- Example: Group discussion about the clip. Show an overview of the conclusions to wrap up, pointing back to what was said.

Test
- Let the interviewers apply what they have just discussed so they can practice and you can re-assess the progress; Go back into 'teach' phase if necessary!
- Example: Roleplay in which an interviewer starts an interview properly. If necessary, another group discussion, a 'correct' movie clip and/or a new roleplay.

The PowerPoint takes a modular approach in which all essential elements of the briefing are covered in a fixed structure of slides. Its core modules each follow the principle of **'engage + test-teach-test'**. While the words 'test' and 'teach' may remind of a classic, frontal teaching approach with high stakes exams, the opposite is true. The test-teach-test method acknowledges the value of including **low-stakes assessments** in instruction (Shepard, 2000). The principle applies cycles of (1) asking for output in very low-stakes 'test' situations, (2) presenting information with a focus on the problems seen while **avoiding frontal teaching** as much as possible, and (3) low-stakes re-testing to practice new skills while checking whether the mediation stage has been effective. This principle is common in language teaching (Lindsay & Knight, 2006). Indeed, in many ways, interviewer briefings are similar to teaching intermediate learners in language classes: existing knowledge should be acknowledged, then corrected and/or strengthened.

4.2. How to work with the PowerPoint presentation

For each slide in the PowerPoint presentation, information on how to use it / what to do with it is included in the comments field under the heading **'How to use this slide'**. It is important that the person doing the briefing follows these suggestions. That way, the teaching approach laid out in the previous paragraphs will be implemented optimally in each country: the interviewers are engaged and their previous knowledge is activated, tested and adjusted. However, if you feel that the recommended teaching method is, in some ways, not ideal for your interviewers, you will find that many components offered to you in the PowerPoint presentation still lend themselves to a somewhat different approach. If you have no other choice than to decide not to use some slides, make sure you implement another way to ensure that, after the briefing session, your interviewers' knowledge and skills match the requirements listed in chapter 3.

If it is impossible to play the video clips, try to find another way to present the scenarios to the interviewers. They can be presented through audio materials combined with pre-prepared written descriptions of actions taking place, or through written descriptions of the situation and the actors' text alone.

Note that modules about doorstep behaviour and conducting the interview will always contain some elements that should also have been covered in training. We suggest you **do not avoid any overlap with the content of your training sessions**. It is always good for interviewers to get to practice general interviewing rules again while getting acquainted with the ESS materials. Furthermore, such practice situations are also a good chance for the briefer to quickly test whether the interviewers' training was effective and whether interviewers have not developed any strategies that are not allowed in the ESS, and to adjust any mistakes that are evident.

4.3. How to work with the Interviewer Manual

The final Interviewer Manual that you have adapted and translated should be given to the interviewers, either as a digital file or in print. They can **use it for reference** whenever they have questions. Since all information that is in the Manual will also have been covered during the briefing, the Interviewer Manual will not be meant for hours of reading, but it will rather be a document in which interviewers can easily look up any information that they require.

The annotated practice interview has not been appended to the Interviewer Manual because it is meant for practice during the briefing session. Going through this entire 'dummy' interview through role-play is an essential part of the briefing session. If you wish to hand a copy of the dummy interview to the interviewers after the briefing session, you may consider sending them a PDF version or passing around a printed one. Take care however not to overload the interviewer with too many papers and documents, as this way you may run the risk of the interviewers disregarding the essential materials (i.e., the Interviewer Manual).

5. Summary: NC tasks in relation to interviewers

5.1. Overseeing interviewer selection, training, and appointment of cases

As an NC, you should make sure that the survey agency appoints as many **experienced** interviewers as possible. These interviewers should have **received training** already. If not, or if certain crucial aspects of training were not covered, look for an appropriate remedy in the form of additional training sessions or prolonged briefing sessions.

It is also your responsibility to ensure that the survey agency does not allow any interviewers to work on more than 48 cases per ESS round. This **limited number of cases per interviewer** is a requirement in the specifications. It includes completed interviews but also cases that have turned out ineligible, invalid, non-contactable and cases in the context of refusal conversion. If at all possible, strive for a geographical overlap: multiple interviewers visit multiple neighbourhoods, and each neighbourhood is visited by multiple interviewers. Such an '**interpenetrated design**' helps in the assessment of interviewer effects.

MAKING IT ALL HAPPEN

The CST does not intend to enforce too many rules on NCs. The number of 'musts' related to fieldwork in the ESS8 Specifications has therefore remained limited. However, the ESS data clearly point to room for improvement related to the interviewers and the CST wishes to equip you with the best possible suggestions and materials to make progress in these areas.

As an NC, you know best what is necessary and feasible within your country and what workload you and the survey agency can manage in preparing for fieldwork. If you see any possibility at all to implement the CST's recommendations in relation to the interviewers, please do so in order to obtain better data in future rounds. If not, please remain ambitious. Step-by-step improvements are always better than no changes at all. Your country contact would be happy to answer any queries you might have.

5.2. Making sure that in-person briefings take place using the right materials

The ESS8 specifications explicitly state that interviewers must be briefed in-person. This means that each interviewer is expected to partake in a **face-to-face** briefing session. It is strongly recommended that this briefing session makes use of the PowerPoint Presentation that is provided by the CST, and that interviewers receive a copy of the Interviewer Manual. NCs are asked to make sure that these briefing **materials are prepared**, i.e., that they are adapted to national circumstances and that they are translated. In any case, the obligatory components of the interviewer briefing that are listed above must be covered.

NCs should furthermore work with the survey agency to make sure that each interviewers has the necessary materials to work with during fieldwork, e.g., an identification badge, any leaflets or advance letter, the right forms, possibly a laptop or tablet computer, a clear overview of cases assigned to them, etc.

5.3. Following up on the interviewers’ work and checking its quality

During fieldwork, you should obtain weekly **progress reports** (or fortnightly if the fieldwork will last longer than 10 weeks and weekly reports are impossible). You must send these reports to your country contact, but you should also evaluate them yourself. Is fieldwork going too slow? Are non-final cases abandoned before 2 weeks have passed and 4 contact attempts have taken place (one at the weekend and one in the weekend)? Can you detect any nonresponse bias, for instance based on any information that you have about the respondents’ gender and age or based on the information about the respondents’ home and neighbourhood? These are all signals that it may be time to **intervene**. Discuss the options with the survey agency. You could, for instance, start targeting specific sample units to reduce the nonresponse bias or start refusal conversion efforts early on. Your country contact can help you determine good strategies.

Back-checks are also an important element of fieldwork. The ESS8 Specifications state that a reasonable percentage of cases (10% of interviews as well as 5% of refusals and 5% of non-contacts and ineligibles) should be re-contacted to verify whether the outcome registered by the interviewer is correct. If at all possible, try to have these back-checks done by an impartial party.

Once the data are available, ensure again that the **data protocol has been followed**.

5.4. Reporting back to the Core Scientific Team

All materials that were used in the context of interviewer briefing must be **uploaded to the NC intranet**. Please do this as soon as all interviewer briefing sessions have taken please. You will also be asked to fill out – in cooperation with the fieldwork director – a short online questionnaire about your use of the materials. You will receive an invitation during the course of fieldwork.

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Appendices (in zipped folder)

APPENDIX 1: The full ESS interview, annotated for use in the briefings

Please prepare as instructed on page 14. This 'dummy interview' must be covered in full during each briefing session through a role-play. You may give a (digital) copy to your interviewers afterwards, but this is certainly not obligatory (see p. 19).

APPENDIX 2: The Interviewer Manual

Please prepare as instructed on page 14. Make sure the interviewers all receive a copy upon being briefed. You can either print the Manual or give the interviewers a PDF to upload to their work laptop/tablet.

APPENDIX 3: The ESS briefing PowerPoint presentation

Please prepare as instructed on page 14. These slides are the basis for each briefing session.

APPENDIX 4: Excel file with source images for the PowerPoint presentation

This Excel file contains images and graphs to be used in two parts of the briefing: (1) the part in which findings from previous rounds are briefly mentioned and (2) the part in which good and less good aspects of the interviewers' work on previous ESS rounds is discussed. Select the graphs that are most striking for your country.

APPENDIX 5: Movie clips to include in the PowerPoint presentation

APPENDIX 6: Subtitle files for the movie clips