FCSM Subcommittee on Question Evaluation Methodology: An Overview

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History

- 1995: Paperwork Reduction Act
- 2001: Information Quality Act
- 2002: OMB Guidelines for Ensuring Quality
- 2006: OMB Standards and Guidelines for Statistical Surveys
- 2012: FCSM Subcommittee on Question Evaluation Methodology
Paperwork Reduction Act (PRA) of 1995 requires agencies employ effective and efficient survey methodologies.

PRA also requires OMB to “develop and oversee the implementation of government-side policies and standards concerning statistical collection methods.”
Information Quality Act


- OMB was to give agencies guidelines for ensuring and maximizing the quality, objectivity, utility, and integrity of information.
2006 OMB Standards

To assist agencies with their information collections in 2006 OMB published

- Guidance on Agency Survey and Statistical Information Collections
- Standards and Guidelines for Statistical Surveys
Pretesting is Required

The guidance encourages agencies to conduct

“Testing...as an effective means of refining collections of information...”

The standards state:

“Agencies must ensure that all components of a survey function as intended ... by conducting a **pretest** of the survey components”
The Pretesting standard has an accompanying guideline with “recommended best practices to fulfill the goals of the standards.”

**Guideline 1.4.1:** Test new components of a survey using methods such as cognitive testing, focus groups, and usability testing, prior to a field test of the survey system...
To help agencies meet these requirements, the FCSM the chartered the Subcommittee on Question Evaluation Methodology.
Subcommittee Membership

- OMB requested representative nominations from statistical agencies represented on
  - Interagency Council on Statistical Policy (ICSP)
  - FCSM

- Membership varied over the course of the work
  - Efforts to represent the statistical agencies
Subcommittee Charge

- Inventory how statistical agencies conduct evaluations of their survey questions

- Develop guidelines for conducting such evaluations so as to improve the resulting data quality.
The charter set out three goals:

1. Produce an inventory of methods used across agencies

2. Identify cognitive interviewing guidelines

3. Assess the feasibility of developing guidelines for other question evaluation methods
Subcommittee Process

- Meetings, meetings and meetings (2012-2014)
- Sub-subcommittees
  1. Agency Inventory
  2. Cognitive Interview Guidelines
- Group review and revisions
- Worked towards consensus
  ▶ Settled for majority
Agency Inventory Goals

- Inventory current methods within agencies:
  - Existing question evaluation policy (written or understood)
  - Factors determining how and how often question evaluation is done
  - Constraints preventing question evaluation
  - Resources allocated for question evaluation
  - Evaluation methods used
Agency Inventory: Findings

We don’t all speak the same language!
Agency Inventory: Findings

- Significant differences in terminology used across agencies
  - Related to the type of evaluation methods generally used
    - Pretesting = any evaluation method or just Cognitive interviewing?
    - Field test = Pilot tests or dress rehearsals?
Realized that we needed to start with a consistent set of definitions
Methods Inventory

- Subcommittee replaced the original agency inventory with a inventory of evaluation methods

- Goal was to allow agencies to understand evaluation terms consistently

  - Maybe even start to use consistent language
The subcommittee was also asked to develop guidelines for cognitive interviewing (CI)

- CI is a commonly used evaluation method
- While empirical research on ‘best practices’ is still needed, much is known about how to conduct CIs
- Experienced CI researchers identified recommendations to help agencies conduct sound CI studies
3. Other Best Practices

- The team had a third goal of developing guidelines for other methods
  - The membership of the subcommittee lacked the expertise in other methods
  - Additional teams could be created to tap into the considerable knowledge within the statistical agencies to develop guidelines for other methods
Next Steps

- The Methods Inventory and CI Guidelines are under review

- OMB will determine next steps for review and how these documents will be issued
Subcommittee Members

- Benjamin Bridgeman, BEA
- Lionel Deang, SSA
- Jennifer Edgar, BLS
- Scott Fricker, BLS
- Patricia Goerman, Census
- Joanne Hsu, FRB
- Kashka Kubzdela, NCES
- Jaki McCarthy, NASS
- Kristen Miller, NCHS
- Rebecca Morrison, NSF
- Cleo Redline, NCES
- Paul Scanlon, NCHS
- Kristin Stettler, Census
- Diane Willimack, Census
- Stephanie Wilson, NCHS
- Mark Xu, BEA
- Chair: Jennifer Madans, NCHS