Center for Opinion Research Performance Review Form

Interviewer Name:                                                                 Interviewer ID:

Discussion of Three Call Reviews and Scoring

INTRODUCTION SCORES:__________
AVERAGE SURVEY QUALITY SCORE:__________
AVERAGE NEUTRALITY SCORE:__________
AVERAGE VOICE/SPEECH SCORE:__________

Interviewer, please initial here when done .........................................................

Productivity

Discuss the interviewer's productivity report and strategies for improvement when necessary. Interviewer, please initial here when done. .................................

Handling Hesitant Respondents

Discuss section on handling hesitant respondents. Discuss strategies for improvement when necessary. Interviewer, please initial here when done. .................................

Comments

Discuss the interviewer's strengths.

........................................................................................................................................
........................................................................................................................................
........................................................................................................................................

Discuss the interviewer's challenges. What strategies can be used to make improvements?

........................................................................................................................................
........................................................................................................................................
........................................................................................................................................

Discuss general workplace strengths and challenges. What strategies can be used to make improvements?

........................................................................................................................................
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........................................................................................................................................

Interviewer, please initial here when done. .........................................................
**Disciplinary Status**

Review the interviewer's disciplinary log. Interviewer, please intial here when done. . . . . .

**Other**

Discuss information from feedback slips, or information not included elsewhere on the review.

My signature indicates that my supervisor coach adequately reviewed the entire contents of this form (9 pages) with me. It does not mean that I necessarily agree with the review.

Interviewer Signature: ___________________________ Date: _______________

**Interviewer:** Please use the following space for any comments or concerns, along with any ideas that may improve your experience at the Center.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

**Interviewer:** Would you like a copy of this review for your records? . . . . . . . . . . . . .

☐ 1 Yes ☐ 2 No

Supervisor Print Name ___________________________ Date: _______________

Supervisor Signature: ___________________________
First Call Review

Study Calling: Csid: Date: Time:

A. INTRODUCTION (COR Expectation=100%)

(1) States name ......................................................... □ 1 Yes □ 2 No
(2) States where calling from ........................................ □ 1 Yes □ 2 No
(3) States purpose of call ............................................. □ 1 Yes □ 2 No
(4) Screens for proper respondent (typically with LBM) ........ □ 1 Yes □ 2 No
(5) Explains voluntary participation ............................... □ 1 Yes □ 2 No
(6) Explains confidentiality ........................................... □ 1 Yes □ 2 No

INTRODUCTION: Pass _______ OR Fail _______ (Score: _____)

B. SURVEY QUALITY (COR Expectation=100%)

(7) Repeats ALL response categories when necessary
  □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always □ 6 N/A
(8) Probes "I don’t know" and refusals
  □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always □ 6 N/A
(9) Probes irrelevant answers
  □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always □ 6 N/A
(10) Probes unclear answers
    □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always □ 6 N/A
(11) Probes for "Any others?" or "Which is MOST important?" etc.
    □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always □ 6 N/A
(12) Uses fallback statements when necessary
    □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always □ 6 N/A
(13) Keeps respondent focused and on track
    □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always □ 6 N/A

SURVEY QUALITY: Pass _______ OR Fail _______ (Score: _____)

C. NEUTRALITY (COR Expectation=100%)

(14) Reads questions EXACTLY as written
    □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always
(15) Withholds own opinions about survey items
    □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always
(16) Defines/clarifies items in a neutral way (states, "In general" or "Whatever it means to you")
    □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always □ 6 N/A
(17) Delivers neutral feedback

<table>
<thead>
<tr>
<th>Score</th>
<th>Never</th>
<th>Rarely</th>
<th>Some of the time</th>
<th>Most of the time</th>
<th>Always</th>
</tr>
</thead>
</table>

(18) Probes in a neutral manner

<table>
<thead>
<tr>
<th>Score</th>
<th>Never</th>
<th>Rarely</th>
<th>Some of the time</th>
<th>Most of the time</th>
<th>Always</th>
<th>N/A</th>
</tr>
</thead>
</table>

**NEUTRALITY:** Pass _______ OR Fail _______ (Score: _____)

**D. VOICE/SPEECH QUALITY & DELIVERY**

(19) Maintains an acceptable voice volume

<table>
<thead>
<tr>
<th>Score</th>
<th>Never</th>
<th>Rarely</th>
<th>Some of the time</th>
<th>Most of the time</th>
<th>Always</th>
</tr>
</thead>
</table>

(20) Clearly pronounces and enunciates words

<table>
<thead>
<tr>
<th>Score</th>
<th>Never</th>
<th>Rarely</th>
<th>Some of the time</th>
<th>Most of the time</th>
<th>Always</th>
</tr>
</thead>
</table>

(21) Sounds confident

<table>
<thead>
<tr>
<th>Score</th>
<th>Never</th>
<th>Rarely</th>
<th>Some of the time</th>
<th>Most of the time</th>
<th>Always</th>
</tr>
</thead>
</table>

(22) Sounds enthusiastic and/or interested

<table>
<thead>
<tr>
<th>Score</th>
<th>Never</th>
<th>Rarely</th>
<th>Some of the time</th>
<th>Most of the time</th>
<th>Always</th>
</tr>
</thead>
</table>

(23) Practices voice inflection and avoids sounding monotonous

<table>
<thead>
<tr>
<th>Score</th>
<th>Never</th>
<th>Rarely</th>
<th>Some of the time</th>
<th>Most of the time</th>
<th>Always</th>
</tr>
</thead>
</table>

(24) Is pleasant and polite

<table>
<thead>
<tr>
<th>Score</th>
<th>Never</th>
<th>Rarely</th>
<th>Some of the time</th>
<th>Most of the time</th>
<th>Always</th>
</tr>
</thead>
</table>

(25) Maintains an acceptable pace when reading items

<table>
<thead>
<tr>
<th>Score</th>
<th>Never</th>
<th>Rarely</th>
<th>Some of the time</th>
<th>Most of the time</th>
<th>Always</th>
</tr>
</thead>
</table>

(26) Maintains an acceptable pace between items

<table>
<thead>
<tr>
<th>Score</th>
<th>Never</th>
<th>Rarely</th>
<th>Some of the time</th>
<th>Most of the time</th>
<th>Always</th>
</tr>
</thead>
</table>

(27) Effectively delivers the introduction

<table>
<thead>
<tr>
<th>Score</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
</table>

(28) Is polite at survey conclusion *(thanks respondent for time, etc.)*

<table>
<thead>
<tr>
<th>Score</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
</table>

**VOICE/SPEECH QUALITY & DELIVERY SCORE:_______**

Interviewer Signature: ________________________________ Date: ________________
# Second Call Review

**Study Calling:**  
**Csid:**  
**Date:**  
**Time:**

## A. INTRODUCTION (COR Expectation= 100%)

(1) States name

<table>
<thead>
<tr>
<th>States name</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

(2) States where calling from

<table>
<thead>
<tr>
<th>States where calling from</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

(3) States purpose of call

<table>
<thead>
<tr>
<th>States purpose of call</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

(4) Screens for proper respondent (typically with LBM)

<table>
<thead>
<tr>
<th>Screens for proper respondent (typically with LBM)</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

(5) Explains voluntary participation

<table>
<thead>
<tr>
<th>Explains voluntary participation</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

(6) Explains confidentiality

<table>
<thead>
<tr>
<th>Explains confidentiality</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

### INTRODUCTION:  
**Pass** _______ **OR** **Fail** _______ (Score: _____)

## B. SURVEY QUALITY (COR Expectation= 100%)

(7) Repeats ALL response categories when necessary

<table>
<thead>
<tr>
<th>Repeats ALL response categories when necessary</th>
<th>Never</th>
<th>Rarely</th>
<th>Some of the time</th>
<th>Most of the time</th>
<th>Always</th>
<th>N/A</th>
</tr>
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<tr>
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<td>3</td>
<td>4</td>
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<td>6</td>
</tr>
</tbody>
</table>

(8) Probes "I don't know" and refusals

<table>
<thead>
<tr>
<th>Probes &quot;I don't know&quot; and refusals</th>
<th>Never</th>
<th>Rarely</th>
<th>Some of the time</th>
<th>Most of the time</th>
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(9) Probes irrelevant answers

<table>
<thead>
<tr>
<th>Probes irrelevant answers</th>
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<th>Rarely</th>
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(10) Probes unclear answers

<table>
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<tr>
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<td>6</td>
</tr>
</tbody>
</table>

(11) Probes for "Any others?" or "Which is MOST important?" etc.

<table>
<thead>
<tr>
<th>Probes for &quot;Any others?&quot; or &quot;Which is MOST important?&quot; etc.</th>
<th>Never</th>
<th>Rarely</th>
<th>Some of the time</th>
<th>Most of the time</th>
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</table>

(12) Uses fallback statements when necessary

<table>
<thead>
<tr>
<th>Uses fallback statements when necessary</th>
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</table>

(13) Keeps respondent focused and on track

<table>
<thead>
<tr>
<th>Keeps respondent focused and on track</th>
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### SURVEY QUALITY:  
**Pass** _______ **OR** **Fail** _______ (Score: _____)

## C. NEUTRALITY (COR Expectation= 100%)

(14) Reads questions EXACTLY as written

<table>
<thead>
<tr>
<th>Reads questions EXACTLY as written</th>
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<th>Some of the time</th>
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</tbody>
</table>

(15) Withholds own opinions about survey items

<table>
<thead>
<tr>
<th>Withholds own opinions about survey items</th>
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<th>Rarely</th>
<th>Some of the time</th>
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</table>

(16) Defines/clarifies items in a neutral way (states, "In general" or "Whatever it means to you")

<table>
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<tr>
<th>Defines/clarifies items in a neutral way (states, &quot;In general&quot; or &quot;Whatever it means to you&quot;)</th>
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<th>Rarely</th>
<th>Some of the time</th>
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</tr>
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</table>
(17) Delivers neutral feedback

☐ 1 Never ☐ 2 Rarely ☐ 3 Some of the time ☐ 4 Most of the time ☐ 5 Always

(18) Probes in a neutral manner

☐ 1 Never ☐ 2 Rarely ☐ 3 Some of the time ☐ 4 Most of the time ☐ 5 Always ☐ 6 N/A

NEUTRALITY:  Pass _______ OR  Fail _______ (Score: _____ )

D. VOICE/SPEECH QUALITY & DELIVERY

(19) Maintains an acceptable voice volume

☐ 1 Never ☐ 2 Rarely ☐ 3 Some of the time ☐ 4 Most of the time ☐ 5 Always

(20) Clearly pronounces and enunciates words

☐ 1 Never ☐ 2 Rarely ☐ 3 Some of the time ☐ 4 Most of the time ☐ 5 Always

(21) Sounds confident

☐ 1 Never ☐ 2 Rarely ☐ 3 Some of the time ☐ 4 Most of the time ☐ 5 Always

(22) Sounds enthusiastic and/or interested

☐ 1 Never ☐ 2 Rarely ☐ 3 Some of the time ☐ 4 Most of the time ☐ 5 Always

(23) Practices voice inflection and avoids sounding monotonous

☐ 1 Never ☐ 2 Rarely ☐ 3 Some of the time ☐ 4 Most of the time ☐ 5 Always

(24) Is pleasant and polite

☐ 1 Never ☐ 2 Rarely ☐ 3 Some of the time ☐ 4 Most of the time ☐ 5 Always

(25) Maintains an acceptable pace when reading items

☐ 1 Never ☐ 2 Rarely ☐ 3 Some of the time ☐ 4 Most of the time ☐ 5 Always

(26) Maintains an acceptable pace between items

☐ 1 Never ☐ 2 Rarely ☐ 3 Some of the time ☐ 4 Most of the time ☐ 5 Always

(27) Effectively delivers the introduction

☐ 1 Strongly Disagree ☐ 2 Disagree ☐ 3 Agree ☐ 4 Strongly Agree

(28) Is polite at survey conclusion (thanks respondent for time, etc.)

☐ 1 Strongly Disagree ☐ 2 Disagree ☐ 3 Agree ☐ 4 Strongly Agree

VOICE/SPEECH QUALITY & DELIVERY SCORE:_______

Interviewer Signature: __________________________________________  Date: _________________
Third Call Review

A. INTRODUCTION (COR Expectation=100%)

(1) States name .................................................. □ 1 Yes □ 2 No
(2) States where calling from .................................. □ 1 Yes □ 2 No
(3) States purpose of call ....................................... □ 1 Yes □ 2 No
(4) Screens for proper respondent (typically with LBM) .... □ 1 Yes □ 2 No
(5) Explains voluntary participation ............................ □ 1 Yes □ 2 No
(6) Explains confidentiality ...................................... □ 1 Yes □ 2 No

INTRODUCTION: Pass _______ OR Fail _______ (Score: _____ )

B. SURVEY QUALITY (COR Expectation=100%)

(7) Repeats ALL response categories when necessary
   □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always □ 6 N/A
(8) Probes "I don't know" and refusals
   □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always □ 6 N/A
(9) Probes irrelevant answers
   □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always □ 6 N/A
(10) Probes unclear answers
    □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always □ 6 N/A
(11) Probes for "Any others?" or "Which is MOST important?" etc.
    □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always □ 6 N/A
(12) Uses fallback statements when necessary
    □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always □ 6 N/A
(13) Keeps respondent focused and on track
    □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always □ 6 N/A

SURVEY QUALITY: Pass _______ OR Fail _______ (Score: _____ )

C. NEUTRALITY (COR Expectation=100%)

(14) Reads questions EXACTLY as written
    □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always
(15) Withholds own opinions about survey items
    □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always
(16) Defines/clarifies items in a neutral way (states, "In general" or "Whatever it means to you")
    □ 1 Never □ 2 Rarely □ 3 Some of the time □ 4 Most of the time □ 5 Always □ 6 N/A
Delivers neutral feedback

Never  Rarely  Some of the time  Most of the time  Always

Probes in a neutral manner

Never  Rarely  Some of the time  Most of the time  Always  N/A

NEUTRALITY:  Pass _______  OR  Fail _______  (Score: _____)

D. VOICE/SPEECH QUALITY & DELIVERY

Maintains an acceptable voice volume

Never  Rarely  Some of the time  Most of the time  Always

Clearly pronounces and enunciates words

Never  Rarely  Some of the time  Most of the time  Always

Sounds confident

Never  Rarely  Some of the time  Most of the time  Always

Sounds enthusiastic and/or interested

Never  Rarely  Some of the time  Most of the time  Always

Practices voice inflection and avoids sounding monotonous

Never  Rarely  Some of the time  Most of the time  Always

Is pleasant and polite

Never  Rarely  Some of the time  Most of the time  Always

Maintains an acceptable pace when reading items

Never  Rarely  Some of the time  Most of the time  Always

Maintains an acceptable pace between items

Never  Rarely  Some of the time  Most of the time  Always

Effectively delivers the introduction

Strongly Disagree  Disagree  Agree  Strongly Agree

Is polite at survey conclusion (thanks respondent for time, etc.)

Strongly Disagree  Disagree  Agree  Strongly Agree

VOICE/SPEECH QUALITY & DELIVERY SCORE:_________

Interviewer Signature: __________________________________________  Date: _________________
Handling Hesitant Respondents

1) Study Calling: _____________________  Csid: _________  Date: __________ Time: __________

Record what the hesitant respondent said:

__________________________________________________________

Record what the interviewer said in response:

__________________________________________________________

Quality of Interviewer Response

☐ 1 Poor  ☐ 2 Fair  ☐ 3 Good  ☐ 4 Excellent

Suggestions for Improvement:

__________________________________________________________

2) Study Calling: _____________________  Csid: _________  Date: __________ Time: __________

Record what the hesitant respondent said:

__________________________________________________________

Record what the interviewer said in response:

__________________________________________________________

Quality of Interviewer Response

☐ 1 Poor  ☐ 2 Fair  ☐ 3 Good  ☐ 4 Excellent

Suggestions for Improvement:

__________________________________________________________

3) Study Calling: _____________________  Csid: _________  Date: __________ Time: __________

Record what the hesitant respondent said:

__________________________________________________________

Record what the interviewer said in response:

__________________________________________________________

Quality of Interviewer Response

☐ 1 Poor  ☐ 2 Fair  ☐ 3 Good  ☐ 4 Excellent

Suggestions for Improvement:

__________________________________________________________