

The CEQ Worksheet: A Respondent Tool for Streamlining the Interview Experience and Improving Data Quality

Nhien To and Yezzi Angi Lee

Division of Consumer Expenditure Surveys

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*Any opinions expressed in this presentation are those of the authors
and do not constitute policy of the Bureau of Labor Statistics.*



The CE Survey

- The CED (Diary Survey)
- The CEQ (Quarterly Survey)
 - ▶ Collects data on large and recurring expenditures
 - ▶ Conducted with a computer assisted personal interviewing (CAPI) instrument



Background

- In 2010, the CE Materials team worked on designing a “worksheet” to accompany the CEQ survey
- Support from Field Representative (FR) Focus Groups
- Support from Gemini Project to redesign the Consumer Expenditure Survey



Step 1: Information Gathering

- Selected Six FRs (one from each Regional Office) to participate in one-on-one telephone interviews for this project
- Asked the FRs a series of questions based on an approved semi-structured interviewing protocol



Step 1: Information Gathering

- The Worksheet: an optional tool that respondents can use in between, as well as during the interviews
- FR: “It would help streamline the process of the interview when it takes place; allows it to be efficient and less burdensome on the day of the interview.”



Major Recommendations from FRs

1. Use the worksheet only for Interviews 2-4
Allow the FR to hand the worksheet to the respondent at the end of the prior interview after they have built a relationship with the respondent
2. Establish consistent guidelines as a starting point, but allow FRs flexibility in how they apply the worksheet
3. Ask that the worksheet be filled out only by the main respondent
4. “Pitch” the worksheet to respondents as a tool that will help them to streamline and shorten the interview time



Major Recommendations from FRs

5. Include expenses that are asked by month and items that are difficult to recall without records
6. The worksheet should be no more than one page (front and back); should be simple with large text that is clear and easy to read
7. The worksheet should look professional and include a privacy statement, the FR's contact information, a thank you, and the CE website so that the respondent can look up interesting statistical information

Proceed with development



Benefits

- Shorten interview time
- Reduce respondent burden
- Reduce proxy reporting
- Encourage record use
- Improve the quality of the data reported
- Remind respondents with its tangible presence




Step 2: Design and Evaluation

- Proposed a Design
- Asked FRs to evaluate and provide feedback via an online evaluation form
- Obtained feedback from fifty-two FRs
- Revised the worksheet



Initial Design



Our next interview is on _____ at _____

Consumer Expenditure Quarterly Interview Survey PREPARING FOR YOUR NEXT INTERVIEW

A Census field representative will visit you again in three months to ask you about your household's expenses. You may find the information below and the worksheet provided on the back helpful in preparing for your next interview.

To learn more about the survey and how valuable your response is, visit <http://www.bls.gov/respondents/cex/>.

Thank you for your participation!

- ▶ **Talk to everyone in your household – family members and anyone else living in your home that you share expenses with.** Be ready to answer questions for them or ask them to sit in on part of the interview.
- ▶ **Collect records to help you remember details about your expenses.** Ask others in the household if they have any records, too. Store the records where you can access them during the interview and print or download any online records before the interview. Records will only be used for reference during the interview; we will not keep them.

Types of Records:	Places to Look:
<ul style="list-style-type: none"> ✓ Bills ✓ Receipts ✓ Statements ✓ Checkbooks ✓ Paystubs 	<ul style="list-style-type: none"> ✓ Wallet or Purse ✓ Online accounts ✓ Filing drawers ✓ E-mail ✓ Smartphone apps

Questions?

FR Name: _____

Phone: _____ Email: _____

Expense Worksheet

	Month 1	Month 2	Month 3
Housing Expenses and Utilities			
Mortgage or Rent			
Other Housing Expenses (e.g. HOA/condo fees)			
Specify:			
Specify:			
Water			
Gas or Oil			
Electricity			
Internet/Cable/TV			
Specify:			
Cell Phone			
Other Utilities (e.g. other phone, trash, recycling, sewer)			
Specify:			
Specify:			

	Frequency of payment (Specify: monthly, annually, etc.)	Amount	
Insurance			Total for last 12 months
Health Insurance			
Homeowner's or Renter's Insurance			
Car Insurance			
Life Insurance			
Long Term Care			
Other Insurance (e.g. pet, PMI, credit card)			
Specify:			
Specify:			

Income	
Wages/salary (include tips, bonuses, and commissions before taxes)	
Interest or Dividends	
Other Income (e.g. self-employment, retirement, disability, unemployment, child support, government benefits or assistance)	
Specify:	
Paycheck	
Amount of last pay before deductions	
Deductions for retirement	
Deductions for Social Security/Medicare	

	Current balance
Assets	
Retirement accounts (e.g. 401(k)s, IRAs, TSP)	
Stocks, bonds, or mutual funds (not in retirement)	
Checking, savings, money market, CDs	
Other financial assets (e.g. annuities, trusts, royalties)	
Specify:	
Specify:	

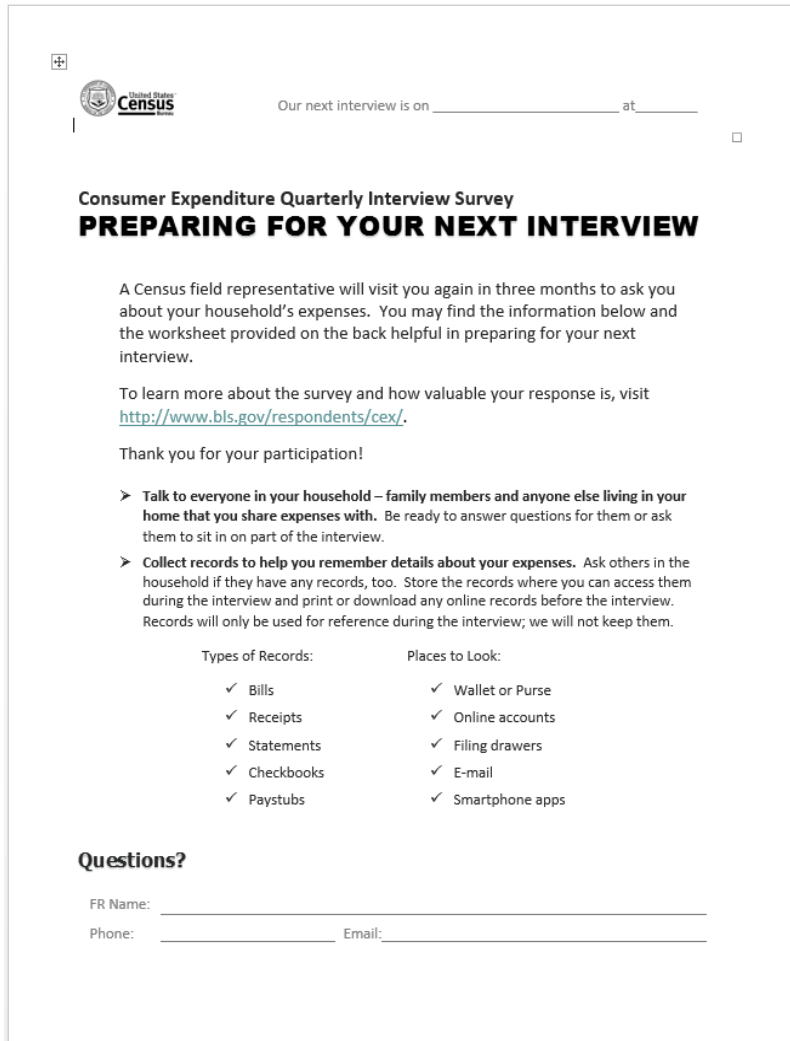
	Current balance
Liabilities	
Major credit cards (include store and gas cards)	
Student Loans	
Other liabilities (e.g. medical, personal, do NOT include mortgage, home equity or vehicle loans)	
Specify:	
Specify:	

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FR Feedback

Regarding the Front of the CEQ Worksheet



The image shows a screenshot of the front page of a Consumer Expenditure Quarterly Interview Survey worksheet. At the top left is the U.S. Census Bureau logo. Below it, the text reads "Our next interview is on _____ at _____". The main heading is "Consumer Expenditure Quarterly Interview Survey PREPARING FOR YOUR NEXT INTERVIEW". The text explains that a field representative will visit in three months and provides instructions on how to prepare, including talking to household members and collecting records. A list of record types and places to look is provided. At the bottom, there are fields for "FR Name:", "Phone:", and "Email:".

United States
Census
BUREAU

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Types of Records:	Places to Look:
✓ Bills	✓ Wallet or Purse
✓ Receipts	✓ Online accounts
✓ Statements	✓ Filing drawers
✓ Checkbooks	✓ E-mail
✓ Paystubs	✓ Smartphone apps

Questions?

FR Name: _____

Phone: _____ Email: _____

Appearance

- 83% Positive about the appearance
- 63% of FRs felt respondents would have a positive reaction

Content

- 73% positive about the content
- 21% negative about the content
 - ▶ Concerned that the worksheet might scare busy respondents away

Revised Design: Front

Changed "A Census field representative..." to "Your Census field representative..." to make it more personal.

United States
Census

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Types of Records:	Types of Records:
✓ Bills	✓ Checkbooks
✓ Receipts	✓ Paystubs
✓ Statements	✓ Online Records

Questions?


Field Representative Name: _____
Phone: _____

Initial

Revised



Revised Design: Front

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Types of Records:
✓ Bills
✓ Receipts
✓ Statements

Questions?

Field Representative Name: _____
Phone: _____


Added the following sentence: The worksheet shows you some of the types of spending that I'll be asking about, and if you note these expenses on the worksheet, the interview may be faster while also making it easier for you to give accurate amounts.

Initial

Revised



Revised Design: Front

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Questions?

FR Name: _____
Phone: _____ Email: _____



Deleted "Places to Look" for records and the associated examples.

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Initial

Revised



Revised Design: Front

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Types of Records:	Places to Look:
<input checked="" type="checkbox"/> Bills	<input checked="" type="checkbox"/> Wall
<input checked="" type="checkbox"/> Receipts	<input checked="" type="checkbox"/> Online
<input checked="" type="checkbox"/> Statements	<input checked="" type="checkbox"/> Filing
<input checked="" type="checkbox"/> Checkbooks	<input checked="" type="checkbox"/> E-mail
<input checked="" type="checkbox"/> Paystubs	<input checked="" type="checkbox"/> Smartphone

Questions?

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Types of Records:	
<input checked="" type="checkbox"/> Bills	<input checked="" type="checkbox"/> Checkbooks
<input checked="" type="checkbox"/> Receipts	<input checked="" type="checkbox"/> Paystubs
<input checked="" type="checkbox"/> Statements	<input checked="" type="checkbox"/> Online Records

Questions?

Field Representative Name: _____
Phone: _____

Deleted the FR email line. Two FRs mentioned that they were afraid respondents may unknowingly send PII.

Initial

Revised



FR Feedback

Regarding the Back of the CEQ Worksheet

Expense Worksheet

Housing Expenses and Utilities	Month 1	Month 2	Month 3
Mortgage or Rent			
Other Housing Expenses (e.g. HOA/condo fees)			
Specify:			
Specify:			
Water			
Gas or Oil			
Electricity			
Internet/Cable/TV			
Specify:			
Cell Phone			
Other Utilities (e.g. other phone, trash, recycling, sewer)			
Specify:			
Specify:			

Insurance	Frequency of payment (Specify: monthly, annually, etc.)	Amount
Health Insurance		
Homeowner's or Renter's Insurance		
Car Insurance		
Life Insurance		
Long Term Care		
Other Insurance (e.g. pet, PMI, credit card)		
Specify:		
Specify:		

Income	Total for last 12 months
Wages/salary (include tips, bonuses, and commissions before taxes)	
Interest or Dividends	
Other Income (e.g. self-employment, retirement, disability, unemployment, child support, government benefits or assistance)	
Specify:	

Paycheck
Amount of last pay before deductions
Deductions for retirement
Deductions for Social Security/Medicare

Assets	Current balance
Retirement accounts (e.g. 401(k)s, IRAs, TSP)	
Stocks, bonds, or mutual funds (not in retirement)	
Checking, savings, money market, CDs	
Other financial assets (e.g. annuities, trusts, royalties)	
Specify:	
Specify:	

Liabilities	Current balance
Major credit cards (include store and gas cards)	
Student Loans	
Other liabilities (e.g. medical, personal, do NOT include mortgage, home equity or vehicle loans)	
Specify:	
Specify:	

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Appearance

- 73% of FRs said they liked the appearance

Content

- 40% of FRs said to add more categories
- 38% of FRs said that some categories should be removed



Revised Design: Back

Expense Worksheet

Housing Expenses and Utilities	Month 1	Month 2	Month 3
Mortgage or Rent			
Other Housing Expenses (e.g. HOA/condo fees)			
Specify:			
Specify:			
Water			
Gas or Oil			
Electricity			
Internet/Cable/TV			
Specify:			
Cell Phone			
Other Utilities (e.g. other phone, trash, recycling, sewer)			
Specify:			
Specify:			

Insurance	Frequency of payment (Specify: monthly, annually, etc.)	Amount	Income	Total for last 12 months
Health Insurance			Wages/salary (include tips, bonuses, and commissions before taxes)	
Homeowner's or Renter's Insurance			Interest or Dividends	
Car Insurance			Other Income (e.g. self-employment, retirement, disability, unemployment, child support, government benefits or assistance)	
Life Insurance			Specify:	
Long Term Care			Paycheck	
Other Insurance (e.g. pet, PMI, credit card)			Amount of last pay before deductions	
Specify:			Deductions for retirement	
Specify:			Deductions for Social Security/Medicare	

Assets	Current balance	Liabilities	Current balance
Retirement accounts (e.g. 401(k)s, IRAs, TSP)		Major credit cards (include store and gas cards)	
Stocks, bonds, or mutual funds (not in retirement)		Student Loans	
Checking, savings, money market, CDs		Other liabilities (e.g. medical, personal, do NOT include mortgage, home equity or vehicle loans)	
Other financial assets (e.g. annuities, trusts, royalties)		Specify:	
Specify:		Specify:	
Specify:		Specify:	

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Income, assets,
and liabilities were
removed from the
worksheet.



Expense Worksheet

Housing Expenses and Utilities	Month 1	Month 2	Month 3
Mortgage			
Rent			
Other Housing Expenses (e.g. Homeowner's Association Fees, Condominium Fees)			
Specify:			
Specify:			
Telephone, Internet, and Cable/Satellite TV Expenses			
Specify:			
Specify:			
Electricity			
Gas or Oil			
Water and Sewerage			
Garbage and Recycling Collection			
Other Utilities (e.g. Water Softening Service, Septic Tank Cleaning)			
Specify:			
Specify:			

Insurance	Frequency of Payment (Specify: monthly, annually, etc.)	Amount
Long Term Care Insurance		
Life Insurance		
Homeowner's Insurance		
Renter's Insurance		
Vehicle Insurance		
Health Insurance		
Dental Insurance		
Vision Insurance		
Other Insurance (e.g. pet, PMI, credit card)		
Specify:		
Specify:		

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Initial

Revised



Revised Design: Back

Expense Worksheet

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Mortgage or Rent			
Other Housing Expenses (e.g. HOA/condo fees)			
Specify:			
Specify:			
Water			
Gas or Oil			
Electricity			
Internet/Cable/TV			
Specify:			
Cell Phone			
Other Utilities (e.g. other phone, trash, recycling, sewer)			
Specify:			
Specify:			

Insurance	Frequency of payment (Specify: monthly, annually, etc.)	Amount
Health Insurance		
Homeowner's or Renter's Insurance		
Car Insurance		
Life Insurance		
Long Term Care		
Other Insurance (e.g. pet, PMI, credit card)		
Specify:		
Specify:		

Income	Total for last 12 months
Wages/salary (include tips, bonuses, and commissions before taxes)	
Interest or Dividends	
Other Income (e.g. self-employment, retirement, disability, unemployment, child support, government benefits or assistance)	
Specify:	

Paycheck	
Amount of last pay before deductions	
Deductions for retirement	
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Assets	Current balance
Retirement accounts (e.g. 401(k)s, IRAs, TSP)	
Stocks, bonds, or mutual funds (not in retirement)	
Checking, savings, money market, CDs	
Other financial assets (e.g. annuities, trusts, royalties)	
Specify:	
Specify:	

Liabilities	Current balance
Major credit cards (include store and gas cards)	
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Other liabilities (e.g. medical, personal, do NOT include mortgage, home equity or vehicle loans)	
Specify:	
Specify:	

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Initial



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Mortgage			
Rent			
Other Housing Expenses (e.g. Homeowner's Association Fees, Condominium Fees)			
Specify:			
Specify:			
Telephone, Internet, and Cable/Satellite TV Expenses			
Specify:			
Specify:			
Electricity			
Gas or Oil			
Water and Sewerage			
Garbage and Recycling Collection			
Other Utilities (e.g. Water Softening Service, Septic Tank Cleaning)			
Specify:			
Specify:			

Insurance	Frequency of Payment (Specify: monthly, annually, etc.)	Amount
Long Term Care Insurance		
Life Insurance		
Homeowner's Insurance		
Renter's Insurance		
Vehicle Insurance		
Health Insurance		
Dental Insurance		
Vision Insurance		
Other Insurance (e.g. pet, PMI, credit card)		
Specify:		
Specify:		

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Changed the order of the utilities to match the Interview's question order

Revised



Field Test

Test the feasibility and effectiveness of the CEQ Worksheet

- What is the effect of the CEQ Worksheet on response rates?
- What is the impact of the CEQ worksheet on data quality?
- What is the feedback from respondents?
- What is the impact of the addition of the CEQ worksheet on production data collection and/or processing activities?



Sample Design and Placement Period

- There will be an independent test group in the production sample with the remaining Quarterly Interview production sample as a control
- 200 cases per month (600 total) will be eligible for the Worksheet
- Placement Period: 3rd quarter of 2018 (Only households going into their 3rd interview will be eligible)

2018	July	August	September
Test group N=600	200 eligible for CEQW	200 eligible for CEQW	200 eligible for CEQW
Control Group N=TBD	Remaining CEQ Production Sample	Remaining CEQ Production Sample	Remaining CEQ Production Sample



Methodology

At the end of the 3rd Interview:

- The FR will have the option to offer the respondent a Worksheet
- If a Worksheet is offered, respondent will keep over the next 3 months

At the 4th interview:

- The FRs would ask the respondents whether they used the Worksheet and if so, will have the respondent reference the Worksheet during the interview to help report their expenditures
- The FR will ask the respondent a few questions about the Worksheet

FR Feedback

Following the test, debriefing will be conducted to obtain FRs feedback about the worksheet



Next Steps

Recommend whether and/or how to implement the CEQ Worksheet in the CE redesign and/or current CE production



Contact Information

Nhien To

Economist

**Division of Consumer Expenditure Surveys/
Office of Prices and Living Conditions**

www.bls.gov/cex

202-691-6866

to.nhien@bls.gov

