I’m Also a Client: Cognitive Interviewing from User and Practitioner Perspectives

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In the course of testing a questionnaire, I discovered strong evidence of a problem with a particular question I presented:

- The nature of the problem
- Evidence that the problem really existed
- A potential solution to the problem

The results were received with interest

And the original question was fielded in the survey, unchanged
Making sense of this situation

- Stages in my thinking:
  - **Theory 1:** My evidence must not be convincing
    - As a result, increased focus on evidence and explanation for why this problem is likely to be real and consequential
  - **Theory 2:** They believe the problem, but don’t have confidence in my solution
    - Rather than thinking of blunt solutions, express it more in terms of tradeoffs between versions
  - **Theory 3:** These people are idiots
    - They don’t believe in measurement error, or don’t care, or are lacking in character
Questionnaire design decisions rest with me
Original question will be used by default, but methodologist advised changes to wording and multiple questions
Also in the room:
- External sponsors (concepts)
- Stakeholders (trends)
- Data collection agent (costs, implementation)
- Statisticians (imputation)
The dilemma: measurement error vs. other concerns
Another scenario

- Approached by an external sponsor who wanted to add a topical module to one of our surveys
- Questions drafted but needed work
- Cognitive interviews done through highly experienced contractor (good protocol, report, etc.)
- We accepted the proposed questions
- They were disastrous in the field
What went wrong

- One of two major obstacles to the usefulness of cognitive interview findings
- One is user-based, one is practitioner-based
- The problem in this case was our fault: insufficient sponsor engagement
- The overall approach:
  - Here’s a questionnaire
  - Test it
  - Make it better
  - Tell us what questions to ask
Why did it fail?

- Accepted end results uncritically
- Didn’t evaluate the end questions or actively participate in their evaluation
- More importantly, too distant throughout the project
  - Hundreds of potential lines of investigation
  - We could have provided focus and background
  - They did improve the questions, but left many issues untouched
- Approach fails to find key problems and ultimately minimizes the usefulness of cognitive interviewing
Equivalent problem on the practitioner side

- Not applying findings to answer the real questions that sponsors have
- Our key need is navigating specific decisions, choosing among various forks in the road
- We often get rich data about how respondents interpret or answer questions… but that doesn’t quite go far enough to help with these decisions
- The gap is sometimes very significant
Contrary arguments

- Only you know your data needs; you need to figure out how to apply results
  - Clearly, sponsors must contribute to the discussion, but without understanding the findings’ implications it is unlikely to be useful

- The evidence is incomplete, and making concrete recommendations is dangerous
  - We’re not that worried. Yours is a vital voice, but only one of many that determines final questions.
  - We are used to making decisions based on incomplete information
  - The risk of using no information is greater than the risk from using incomplete information
There is no evidence that directly addresses the question you raise, and our opinions alone are of little value

- Your opinions are more valuable than you realize
- You might have experience about related issues...
- ... or relevant knowledge from empirical literature
- Cognitive interviews usually don’t provide truly definitive evidence, and your judgment is usually part of the analysis (and gladly accepted)
- Are needs are very pragmatically-orientated
In recent years there’s been a lot of attention to “optimizing” cognitive interviewing to make questions as error-free as possible.

This is good and well, but two other areas call out for attention:

- Seeking generalizable lessons across questions
- Quantifying the statistical impact of the problems you discover

When choosing between quantifiable error and conceptual (non-quantified) error, most managers will go after the quantifiable; but the people at this meeting have much to contribute toward improving that situation.