

## **APPENDIX H:**

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# **INTERVIEWING TRAINING MANUAL**

# Atlanta Regional Transit Survey Interviewer's Manual

(rev. 9-28-09)

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Your Name

Developed for the Atlanta Regional Commission

By:

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**Table of Contents**

<b><u>Topic</u></b>	<b><u>Page</u></b>
Chapter 1: Opening The Meeting And Introductions	3
Chapter 2: Overview Of The Atlanta Regional Commission Study	4
Chapter 3: The Questionnaire	5
Chapter 4: Operating The Tablet PC	6
Chapter 5: Recruiting Passengers And Administering The Questionnaire	15
Chapter 6: Responding Appropriately When Passengers Refuse To Participate	21
Chapter 7: Counting Bus Passengers And Recording The Data	22
Chapter 8: Responding To Problems Or Unusual Situations	23
Chapter 9: Wearing Appropriate Clothing	24
Chapter 10: Preparing For Your First Day Of Data Collection	25

## Chapter 1: Opening The Meeting And Introductions

<b>Purpose</b>	This manual is for use preparing data collectors for a study ETC Institute is conducting for the Atlanta Regional Commission.
<b>Resources required for the preparation meeting</b>	<p>Listed below are the resources that should have been placed on the table at your seat. If any resources are missing, tell the presenter.</p> <ul style="list-style-type: none"> <li>* 1 pen</li> <li>* 1 name badge</li> <li>* 1 name tent</li> </ul>
<b>Identify yourself</b>	Use the black marking pen to print your first name on the name badge and on the name tent. Put the name badge on the front of your shirt or blouse. Position the name tent so your name faces the presenter.
<b>Purpose of the meeting</b>	This meeting has two basic purposes. The primary purpose is to orient and prepare data collectors for their assignments in this study for the Atlanta Regional Commission. The other is to help prepare Team Leaders to supervise the data collectors.
<b>Activities that will be used during this meeting</b>	<p>Several activities will be used to prepare the data collectors and Team Leaders for their assignments.</p> <ul style="list-style-type: none"> <li>* Critical information about this study will be presented, including examples of what the data collectors should do.</li> <li>* Practice exercises will be used to help the data collectors become proficient on the most critical tasks assigned to them.</li> <li>* There will be many opportunities for you to ask questions about this study.</li> </ul>
<b>How to use this manual</b>	To benefit from this manual, read it when the presenter assigns pages to read. You may also write notes in this manual. Take this manual with you at the end of the meeting and refer to it when appropriate. Your benefits from this preparation meeting will be significantly reduced if you are distracted. To prevent distractions, please turn off all your wireless communications devices, including cell phones, ipods, and pagers. And leave them off during the meeting.

## Chapter 2: Overview Of The Atlanta Regional Commission Study

- Introduction** This chapter contains basic information about this study.
- Reasons for this study** The basic purpose of this study is to provide the Atlanta Regional Commission (ARC) and its member organizations with information that will be used to help plan future improvements to the bus and commuter train services in the city of Atlanta and in the twenty surrounding counties that are included in this study. For example, the results of this study will be used to help decide what new bus and commuter train routes to develop and to help plan extensions of existing bus and commuter train routes.
- How ARC will benefit from this study** The ARC will benefit from this study by having a large and reliable body of evidence on which to base its decisions about creating new routes and modifying existing routes. Since the funds available to the ARC will always be limited, this study will help the ARC to invest its limited funds where they will benefit the most people.
- How ARC passengers will benefit from this study** The information that passengers provide about their use of bus and commuter train services will be used by ARC to plan future improvements to the bus and commuter train service in the Atlanta metropolitan area. These improvements could make bus and commuter train service accessible to more people in more parts of the metropolitan area.
- Methodology of this study** This study will cover bus and commuter train routes in the city of Atlanta and in twenty surrounding counties. Approximately 225 bus and commuter train routes will be included. All passengers who are 16 years old and older are eligible to participate in this study. Data collection will start in September and continue through the Fall.
- At the beginning of each day of data collection your Team Leader will inform you of the minimum number of completed questionnaires expected from the route assigned to you. For example, if the average number of daily riders on a route is 650 or more, then the minimum number of completed questionnaires for that route will be 65 (10%).
- Questions?** If you have any questions about the methodology of the study, its purpose, or its benefits, now's a good time to ask them.

**Use the space below to write notes**

### **Chapter 3: The Questionnaire**

- Introduction** In this chapter you'll learn about the questionnaire by reading it and listening to the presenter explain it.
- What to do** After the presenter distributes printed copies of the questionnaire, read the questionnaire as the presenter explains it.
- Standards for a completed questionnaire** Certain questions must be answered in order for a questionnaire to be considered complete and, therefore, useful for the purposes of this study. On the printed questionnaires, the item number of questions that must be answered is enclosed by a square. The square will make it easier for you to find the questions that must be answered to determine if a passenger answered them. The tablet PC ensures that the questions that require an answer are answered because the tablet PC doesn't allow a person to advance from a required question to the next question unless the required question is answered.
- Questions?** If you have any questions about the questionnaire, now's a good time to ask them.

**Use the space below to write notes**

## **Chapter 4: Operating The Tablet PC**

- Introduction** In this chapter you'll learn how to operate the tablet PC being used in this study.
- What to do** After the presenter distributes the tablet PCs, observe the demonstration and explanation of the tablet PC operations listed below and also read, starting on the next page, how to perform each operation.
- Turn battery power on/off.
  - Connect to/disconnect from AC current.
  - Access the questionnaire program.
  - Enter answers to questions.
  - Change an answer.
  - Advance to the next question.
  - Go back to a previous question.
  - Prepare the program to administer the questionnaire to another passenger.
  - Brighten/darken the screen to reduce glare or to increase the contrast between the numbers and letters and the background.
  - Exit the questionnaire program.
  - Shut off software.

## Performance Aid: Operating The Tablet PC

### Directions:

1. Perform each of the operations listed below while a Team Leader observes you.
2. Get feedback about what was done well and how to improve.
3. Repeat any operations that need improvement.

### Tablet PC Operation

### How You Perform This Operation

Turn battery power on	Slide down and release the silver button at the top of the left side of the tablet PC.
Turn battery power off	If operating on battery power, then no further action is required after shutting off the software.
Connect to AC current	Connect the power cord to the tablet PC, then plug it into an AC electrical outlet
Disconnect from AC current	After shutting off the software, disconnect the power cord from the AC electrical outlet
Access the questionnaire program	<ol style="list-style-type: none"> <li>1. Press the stylus twice in rapid succession on the icon, Digivey Launcher 3.</li> <li>2. In the window, Digivey, press the stylus once on the button, Projects.</li> <li>3. In the window, Select Project Name, press the stylus once on the button, Select.</li> <li>4. Press the stylus once on Start, which is located in the center of the bottom of the window, ARC Transit Survey.</li> </ol>
Exit the questionnaire program	<ol style="list-style-type: none"> <li>1. Press the stylus twice in the top center of the screen.</li> <li>2. Press the stylus once in the top left corner of the screen.</li> <li>3. Press the stylus once in the bottom right corner of the screen.</li> </ol>
Enter answers to questions	Press the stylus once on the appropriate answer on the screen.
Go back to a previous question	Press the stylus on the button, Back, as often as is required to return to the appropriate question. The Back button is located at the bottom left of the display screen.
Change an answer	<ol style="list-style-type: none"> <li>1. Access the screen with the appropriate question.</li> <li>2. Press the stylus once on the correct answer.</li> </ol>
Save answers	The questionnaire program does this automatically; you are not required to take any action to save answers.
Advance to the next question	Press the stylus once on the button, Next, which is located at the bottom right of the display screen.

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**Performance Aid: Operating The Tablet PC**  
(continued)

**Tablet PC Operation**

Brighten/darken the screen

Prepare the program to administer the questionnaire to another passenger

**How You Perform This Operation**

1. With any screen displayed, use a finger to press once the silver button that is third from the top in the front right margin of the tablet PC.
2. Locate the Display section of the display.
3. Adjust the brightness by touching the stylus to the appropriate vertical lines on the scale, Dim – Bright.

If a passenger has answered all the questions, and you've pressed the stylus on the button with your name, then press the stylus once in the top left corner of the screen and once in the bottom right corner of the screen.

If a passenger answers some of the questions, then refuses to answer any more, then:

1. Ask the passenger if they will complete a paper questionnaire at home, then mail it to the survey company in a stamped, self-addressed envelope you'll provide.
2. Follow this rule:

**If the passenger:**

Refuses to take a printed questionnaire

Agrees to take a printed questionnaire

**Then:**

Thank the person for their time and say goodbye.

- A. Enter these data into the tablet PC:
  - Where passenger got on the bus or train.
  - Where passenger will exit the bus or train.
  - Serial number on the envelope containing the questionnaire.
- B. Press the stylus once on the button with your name.
- C. Press the stylus once in the top left corner of the screen, then once in the bottom right corner.
- D. Give the passenger a printed questionnaire and an ETC Institute return envelope.
- E. Thank the passenger for being willing to participate.

3. Exit the incomplete questionnaire by pressing the stylus twice in rapid succession on the top center of the display screen.
4. Press the stylus once in the top left corner of the screen.
5. Press the stylus once in the bottom right corner of the screen.

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**Performance Aid: Operating The Tablet PC**  
(continued)

**Tablet PC Operation**

Shut off software

**How You Perform This Operation**

1. Press the stylus once in the top right corner of the screen while depressing the switch button on the stylus.
2. Press the stylus once on the button, Exit, in the window, Digivey.
3. Press the stylus once on the button, Start, in the lower left corner of the screen.
4. In the window, Motion User, press the stylus once on the button, Turn Off Computer.
5. In the window, Turn Off Computer, press the stylus once on the button, Turn Off.

**Note:** If the tablet PC has been operating on battery power, Step 5 will shut off the battery power.

## Chapter 5: Recruiting Passengers And Administering The Questionnaire

**Introduction** In this chapter you'll learn how to recruit passengers and administer the questionnaire.

### Directions:

1. Practice recruiting a passenger and administering the questionnaire while a Team Leader watches you.
2. Get feedback about what you did well and how to improve.
3. Repeat any step that needs improvement.

### Step

1. Follow this rule:

**If the vehicle is a:**

Bus

Train

**Then:**

Go to Step 3 below.

Go to Step 2 below.

2. Decide whether to recruit another passenger by completing Steps 2A and 2B.
  - 2A. Given the amount of time it usually takes a person to answer the questions on paper or with the tablet PC, is there enough time to complete the questionnaire before the next train is scheduled to arrive?
  - 2B. Follow this rule:

**If the amount of time before the next train is scheduled to arrive is:**

Adequate to answer all the questions

Not adequate to answer all the questions

**Then:**

Go to Step 3 below

Do not recruit a passenger now

3. If a passenger appears to be 16 years old or older, then recruit the passenger.
  - A. Greet passenger.  
(Examples: Hi, Good morning, Good afternoon, Excuse me)
  - B. Briefly state the purpose of the study.  
(Example: (name of transit agency) is conducting a study to find ways to improve its services.)
  - C. Recruit passenger.  
(Example: Are you willing to take about five minutes to answer some questions on this topic?)

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**Performance Aid:**  
**Recruiting Passengers And Administering The Questionnaire** (continued)

4. Follow this rule.

**If the passenger:**

Is willing to answer the questions now

Says they do not have time to answer the questions before they get on/off their bus/train

**Then:**

Administer the paper and tablet PC versions of the questionnaire in this alternating pattern: paper – tablet PC – paper – tablet PC.

- A. Say: “I can give you a printed questionnaire and a stamped envelope addressed to the survey company. You could answer the questions at home, then mail your answers.”  
 B. Follow this rule:

**If the passenger:**

Agrees to take a printed questionnaire

Refuses to take a printed questionnaire

**Then:**

- A. Enter these data into the tablet PC:  
 - Where passenger got on the bus or train.  
 - Where passenger will exit the bus or train.  
 - Serial number on the envelope containing the questionnaire.  
 B. Press the stylus once on the button with your name.  
 C. Press the stylus once in the top left corner of the screen, then once in the bottom right corner.  
 D. Give the passenger a printed questionnaire and an ETC Institute return envelope.  
 E. Thank the passenger for being willing to participate.
- A. Thank person for their time; say goodbye.  
 B. Press the stylus once on the button, No.  
 C. Press the stylus once in the top left corner of the screen, then once in the bottom right corner of the screen.

5. When a passenger completes a printed questionnaire, make sure all questions whose item number is enclosed by a square have been answered before you walk away from the passenger.
6. Thank passenger for participating and say goodbye.

## Chapter 6: Responding Appropriately When Passengers Refuse To Participate

**Introduction** In this chapter you'll learn how to respond appropriately when passengers refuse to participate in this study.

**How to respond appropriately** Not all passengers will agree to participate in this study. Data collectors should respond appropriately when a passenger refuses to participate. This means accepting the passenger's refusal to participate without arguing with the passenger or trying to convince the passenger to participate.

**Example of responding appropriately** Below are examples of responding appropriately:  
 "Thanks for telling me. Good-bye."  
 "I understand that you prefer not to answer these questions. Good-bye."  
 "Thanks for your time. Good-bye."

**How NOT to respond** Do **NOT** argue with a passenger or try to convince a passenger to participate.

**Questions?** If you have any questions about how you should respond when a passenger refuses to participate, now's a good time to ask them.

**Use the space below to write notes**

**Example 5 - 1** Observe the presenter conduct a role play showing how to recruit a passenger, then administer the questionnaire when the passenger agrees to answer the questions while riding the bus or waiting for their train.

**Practice Exercise 5 - 1** You will now practice recruiting a passenger and administering the questionnaire when a passenger agrees to answer the questions while riding the bus or waiting for their train. Follow these steps.

1. Comply with the presenter's instructions.
2. Read the Performance Aid: Recruiting Passengers And Administering The Questionnaire (on Pages 19 to 20 of this manual) by yourself until a Team Leader observes you practice these steps.
3. Read and continuously refer to the Performance Aid: Recruiting Passengers And Administering The Questionnaire (on Pages 19 to 20 of this manual) while you perform this exercise to practice responding when a passenger is willing to answer the questions now.
4. Get feedback about what you did well and, if appropriate, how to improve.
5. If your performance is not yet acceptable, repeat this exercise until it is.

**Example 5 - 2** Observe the presenter conduct a role play showing how to respond appropriately when a passenger refuses to participate in the study because they predict they'll get off the bus or their train will arrive before they answer all the questions and who **accepts** a printed questionnaire to complete, then mail back.

**Practice Exercise 5 - 2** You will now practice responding appropriately when a passenger says they don't have time now, but is willing to complete a paper questionnaire, then mail it back.

1. Comply with the presenter's instructions.
2. Read Steps 1 – 4 of the Performance Aid: Recruiting Passengers And Administering The Questionnaire on Pages 19 to 20 of this manual by yourself until a Team Leader observes you practice these steps.
3. Read and continuously refer to Steps 1 – 4 of the Performance Aid: Recruiting Passengers And Administering The Questionnaire (on Pages 19 to 20 of this manual) while you perform this exercise.
4. Get feedback about what you did well and, if appropriate, how to improve.
5. If your performance is not yet acceptable, repeat this exercise until it is.

**Example 5 - 3** Observe the presenter conduct a role play showing how to respond appropriately when a passenger refuses to participate in the study because they predict they'll get off the bus or their train will arrive before they answer all the questions and who **refuses** to accept a printed questionnaire to complete, then mail back.

**Practice Exercise 5 - 3** You will now practice recruiting a passenger and responding appropriately when a passenger doesn't have time now and refuses to complete a printed questionnaire, then mail it back.

1. Comply with the presenter's instructions.
2. Read Steps 1 – 4 of the Performance Aid: Recruiting Passengers And Administering The Questionnaire on Pages 19 to 20 of this manual by yourself until a Team Leader observes you practice these steps.
3. Read and continuously refer to Steps 1- 4 of the Performance Aid: Recruiting Passengers And Administering The Questionnaire (on Pages 19 to 20 of this manual) while you perform this exercise.
4. Get feedback about what you did well and, if appropriate, how to improve.
5. If your performance is not yet acceptable, repeat this exercise until it is.

**Questions?** If you have questions about recruiting passengers and administering the questionnaire, now's a good time to ask them.

**Use the space below to write notes**

## **Chapter 7: Counting Bus Passengers And Recording The Data**

- Introduction** In this chapter you'll learn how to record passenger counts as you ride a bus.
- What to do** Get a copy of the form when the presenter distributes copies of it. Read the form as the presenter explains it.
- When you count passengers and record the data** The number of passengers getting on and off a bus is counted at each bus stop. The count is immediately recorded on the form.
- How to count passengers and record the data on the form** Use these steps to count bus passengers and record the counts.
1. At each stop where passengers get on/off the bus, stand or sit at the front of the bus and count passengers as they get on through the front door and get off through the front and middle doors.
  2. Record the time of each stop and the number of passengers who got on and off in the appropriate spaces for the stop.
- Practice Exercise** Follow the presenter's instructions to practice recording passenger counts on this form.
- Questions?** If you have questions about how to record passenger data on the form, now's a good time to ask them.

**Use the space below to write notes**

## Chapter 8: Responding To Problems Or Unusual Situations

**Introduction** This chapter identifies some of the unusual or problem situations that might occur during data collection and suggests how to respond to them.

**Common problems and unusual situations** The table below lists some of the problems and unusual situations that might occur during this study and suggests how to respond to them.

<u>Problem or Unusual Situation</u>	<u>How You Respond</u>
Passenger does not understand a question.	Answer their question accurately and completely.
Passenger asks about the reason for the study.	Briefly state the purpose of the study and give one probable benefit to the people who live in the area.
Tablet PC malfunctions	If you cannot solve the malfunction by yourself and you have a cel phone, call your Team Leader.  Otherwise, administer printed questionnaires until you meet again with your Team Leader.

**Examples** Observe as the presenter calls on people to practice responding to the situations listed in the table above.

**Questions?** If you have questions about responding to problems or unusual situations, now's a good time to ask them.

**Use the space below to write notes**

## Chapter 9: Wearing Appropriate Clothing

**Introduction** This chapter tells what clothing is appropriate to wear while collecting data for the Atlanta Regional Commission.

**Appropriate clothing** Listed below are examples of clothing that is appropriate for data collectors to wear while working for ARC.

- Clean shirt or blouse (long- or short- sleeve) that fits close, but comfortably around the neck.
- Clean slacks or jeans that fit snug around the waist.
- Plain sneakers (no lights or advertising).
- Shoes.

**Inappropriate clothing** Listed below are examples of inappropriate clothing that should **NOT** be worn by data collectors while they are working for ARC.

- Shirts, blouses, sweatshirts, sweaters, jackets, hats, caps or sneakers with the name of a person or organization printed on them.
- See-through clothing.
- Tops that expose the chest.
- Pants that hang so low they expose skin.
- Any foot wear that exposes the toes or foot.

**Consequences of wearing inappropriate clothing** If a data collector reports to work wearing clothing that is inappropriate for this study, they will not be allowed to work that day and will not be paid for their travel time or travel expenses that day.

**Questions?** If you have any questions about clothing that data collectors should wear while working on the ARC study, now's a good time to ask them.

**Use the space below to write notes**

**Chapter 10:  
Preparing For Your First Day Of Data Collection**

**Introduction** This chapter presents information about your first day of data collection.

**Exchange contact data** Record in the space below the name and telephone number of the Team Leader to whom you will report for this study.

Name of Team Leader: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Give your name and cel and/or home telephone number to your Team Leader.

**When and where to meet your Team Leader** Write on the lines below information about where and when you will meet your Team Leader on the first day of data collection.

Location Name \_\_\_\_\_

Location Street Address \_\_\_\_\_

Where To Meet At This Location: \_\_\_\_\_

Day/Date: \_\_\_\_\_

Time: \_\_\_\_\_

**Use the space below to write notes**

**Information  
about each  
day of data  
collection**

Below is useful information about each day of data collection.

At the start of the day:

1. Get resources from your Team Leader, including:
  - Clip boards
  - Pens/pencils
  - Form on which to record passenger counts
  - Questionnaires printed on heavy card stock – English and Spanish versions
  - Tablet PC with batteries, power cord, and stylus
  - ETC Institute return mail envelopes containing questionnaires printed on paper
  - 2 large mailing envelopes to store completed questionnaires printed on heavy card stock
  
2. Inspect the amount of power remaining in the tablet PC battery by using these steps:
  - A. Use a finger to press the third silver button from the top on the front right side of the tablet PC.
  - B. In the window, Motion Dashboard, locate the section, Power, and read the amount shown as Remaining Charge.
  - C. Follow this rule:

**If the Remaining Charge is:**

Equal to or greater than 85%

Less than 85%

**Then:** \_\_\_\_\_

Go to your assigned bus route or train station.

Tell your Team Leader.

- D. Press the stylus once on the button, Close, which is located in the bottom right corner of the window, Motion Dashboard.

During the day:

- Switch from counting and recording passengers to recruiting passengers and administering the questionnaire every 30 – 45 minutes.
- Meet briefly with your Team Leader each time the bus you are riding returns to the place where your Team Leader is located.
- At all times, protect your resources from damage or theft, especially the tablet PC and completed paper questionnaires.
- Take a break at mid-morning (15 minutes), lunch (30 minutes), and mid-afternoon (15 minutes).

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During the day (continued):

- Every 1 or 2 hours and each time you take a break, inspect the amount of power remaining in the battery of the tablet PC by using these steps:
  - A. Use a finger to press the third silver button from the top on the front right side of the tablet PC.
  - B. In the window, Motion Dashboard, locate the section, Power, and read the amount shown as Remaining Charge.
  - C. Follow this rule:

**If the Remaining Charge Is:**

Equal to or greater than 40%

Less than 40%

**Then:**

Continue using the tablet PC

Find an electrical outlet and re-charge the battery.

- D. Press the stylus once on the button, Close, which is located in the bottom right corner of the window, Motion Dashboard.

At the end of the day:

- Assemble together all completed printed questionnaires; put them in a large white mailing envelope and print on the envelope the bus route or train station name, your name, and the date. Put this envelope (and the passenger count sheets if you were assigned to a bus route) into the case with the tablet PC. If you and your partner used a second tablet PC, then:
  - o Print on a second large white mailing envelope the bus route or train station name, your name, the date, and '2 of 2'. Put this envelope into the case with a tablet PC.
  - o Print '1 of 2' on the other large white mailing envelope.
- Assemble together all unused printed questionnaires. (separate the English and Spanish versions)
- Organize all the other resources given to you that day.
- Review the completed printed questionnaires to identify those that meet the requirements for a completed questionnaire and those that don't meet the requirements. Print 'complete' in the top left corner of the first page of the printed questionnaires that are complete. If a questionnaire is not complete, print 'incomplete' in the top left corner of the first page.
- Give the Team Leader all the resources given to you that day.
- Find out where and when to meet for the next day of data collection.

**Questions?**

If you have questions about the first day of data collection, now's a good time to ask them.