

**OF PROPOSED REVISIONS TO IQCS MINIMUM SERVICE STANDARDS  
FOR MARKET RESEARCH DATA COLLECTION 2013**

<b>1</b>	<b>General</b>  <i>Update to 2012</i>	<b>Page No.</b>  <b>1</b>
<b>1.1</b>	<b>Sub-contracting fieldwork</b>  <i>Update to 2012</i>	<b>1</b>
<b>2.1 g)</b>	<b>General project requirements</b>  <i>All questionnaires shall record:</i> <ul style="list-style-type: none"> <li>• the date of interview</li> <li>• duration of interview</li> <li>• identity of the interviewer</li> <li>• <i>where appropriate any other relevant feedback or corrective action shall be documented</i></li> </ul>	<b>4</b>
<b>2.2</b>	<b>Project briefing</b>  Supervisors, interviewers and recruiters shall be appropriately and adequately briefed on every project. <b><i>[Note: requirements for auditors are covered in Section 8]</i></b>  NOTE. This may be by post, telephone, electronically or in person.  As a minimum, the briefing shall include details of <ul style="list-style-type: none"> <li>▪ fieldwork dates</li> <li>▪ the target sample</li> <li>▪ methodology</li> <li>▪ requirements of the project</li> <li>▪ attendance records</li> <li>▪ permission for audio / visual recording of group</li> </ul> <b><i>Records shall be kept to show the full content of the briefing and instructions and to shall that all interviewers/recruiters allocated to the project have received briefing and instructions</i></b>	<b>4</b>
<b>3.</b>	<b>Supervisors</b> A supervisor is an individual who on behalf of the organisation undertakes at least one of the following data collection tasks: <ul style="list-style-type: none"> <li>▪ selecting and interviewing new recruits;</li> <li>▪ training;</li> </ul>	

	<ul style="list-style-type: none"> <li>▪ monitoring/appraisals/accompaniments/validation;</li> <li>▪ <i>project management</i></li> <li>▪ allocating work, progress chasing and/or project and quota control.</li> </ul> <p>NOTE. an individual employed full or part-time as a member of staff is not deemed to be a supervisor unless the vast majority of their work is undertaking supervisory tasks as defined above.</p>	<b>7</b>
<b>5.2</b>	<p><b>Length and Content of Training</b></p> <p>The dates and length of training given shall be recorded. <i>The trainee shall sign a document to confirm the date(s) and length of training in hours given and this shall be kept in the individual's file.</i></p> <p>The minimum period for training of field-based interviewers new to market research shall be 2 days (12h).</p> <p style="padding-left: 40px;">Note 1 This may include some time spent conducting dummy interviews in field</p> <p>Individuals taken on to work exclusively as interviewers in a telephone centre, who are not previously trained or experienced in this type of work (<u>as outlined below</u>), shall receive a minimum of one day's training (6h).</p> <p>Individuals taken on to work exclusively as recruiters, who are not previously trained or experienced in this type of work (<u>as outlined below</u>), shall receive a minimum of one day's training (6h).</p> <p>For recruiters, field and telephone interviewers, at least half of training should be conducted <i>either</i> face-to-face <i>or interactively</i>.</p> <p>Individuals may qualify for a reduced level of training, if the individual has recent and relevant experience from another research agency complying with the requirements of this standard.</p> <p>To qualify for a reduced level of training, the organisation should ensure that</p> <ol style="list-style-type: none"> <li>a) the individual has worked for a company complying with the requirements of Section 5 of ISO 20252 <i>2012</i> or the IQCS Standard in the last 12 months, and</li> <li>b) has had appropriate / relevant experience in the types of work to be undertaken while working with that company during the last 12 months</li> </ol> <p>NOTE. Individuals who <u>do</u> have recent relevant experience may still be given full training if the organisation deems it necessary/appropriate.</p>	<b>11</b>

<p><b>5.6</b></p>	<p><b><i>Training Evaluation</i></b></p> <p>Following training sessions, attendees shall be given, or sent, a training evaluation questionnaire to complete. This shall be returned to the organisation for independent assessment. Returned forms should be kept in the interviewer/recruiter file or the trainer’s file, as deemed appropriate.</p> <p>Feedback should be monitored for the purpose of continual improvement of the training programme.</p>	<p><b>16</b></p>
<p><b>6.2</b> <b>6.2.1</b></p>	<p><b>Frequency of Appraisals</b> <b>Field-based Interviewers</b></p> <p>Interviewers used on <i>5-9</i> projects/assignments a year, shall be appraised at least once per calendar year; twice if 10 projects or more worked in a calendar year.</p> <p>NOTE 1. Ideally once in each six month period, i.e. once January to June, and once July to December.</p> <p>Interviewers used <i>on 4 or fewer occasions during the year</i> shall be appraised at least once every alternate year, or on the next occasion thereafter that they work.</p> <p>The first appraisal shall be carried out either within six months of the date on which the individual was accompanied on their first assignment, or on the next occasion thereafter that they work, if they are used less frequently.</p> <p>NOTE 2. For example, an individual who had their training accompaniment in February, would be due for appraisal before the end of August (i.e. within six months).</p>	<p><b>17</b></p> <p><b>18</b></p>
<p><b>6.4</b></p>	<p><b>Appraisal of Telephone Centre Interviewers and Recruiters</b></p> <p>NOTE. An organisation may use a continuous monitoring system as input to appraisals.</p> <p>Unless a systematic continuous monitoring system is in operation, each interviewer and each recruiter shall be appraised at least once in a calendar year. An appraisal report shall be documented and dated, signed by the interviewer/recruiter and show details of actions taken/further training given, <i>where appropriate</i>.</p> <p>Where a systematic continuous monitoring system is in operation, <i>evidence of a two-way dialogue shall be documented and retained on file</i>. Where the monitor records are stored electronically, a secure electronic signature system should be in place to demonstrate that the interviewer <del>themselves</del> was present during discussion/feedback and has authenticated the document. <i>This may be via scanning the signed document, use of a unique identifier acceptance via email or by other</i></p>	

	<p><i>security measures built into the system.</i></p> <p><i>NOTE. There is no limit as to how often the documented evidence of two-way dialogue should be done. It may be via at least one monitoring report per annum being completed by the interviewer or be on a continual basis</i></p> <p><i>Where no continuous monitoring is in place, the first appraisal shall be carried out within six months of the date on which the individual was monitored / supervised on their first assignment.</i></p>	<b>19</b>
<b>7</b>	<p><b>Data Validation</b></p> <p>General</p> <p>The purpose of validation is to establish that the data collection has been carried out to briefing instructions and in accordance with general training given.</p> <p>All validation shall be undertaken by individuals adequately and appropriately trained for the task. <i>The content and date of training shall be recorded and kept in the individual's file.</i> Validation shall be undertaken by a second person (i.e., other than the individual whose work is being validated). A systematic and representative method shall be used for the selection and rotation of individuals whose work is to be validated. Every effort shall be made to check a high percentage of the work of those selected individuals.</p> <p>The aim shall be to validate/check each person's work on a regular basis.</p> <p>The number of validation checks attempted and achieved shall be documented.</p> <p>A summary of the validation and the dates on which it was conducted, shall be kept on file for a minimum period of 12 months.</p> <p>Where validation identifies discrepancies or problems the following actions shall be taken;</p> <ul style="list-style-type: none"> <li>▪ Documenting the discrepancies or problems <i>and, where appropriate, the corrective action taken</i></li> <li>▪ At project level, replacing interviews, conducting further validation / re-checking of all other work undertaken by the individual, checking the data produced</li> <li>▪ At the individual level, providing additional training and guidance as part of the continual appraisal process until work is deemed satisfactory</li> </ul>	



