

Field Interviewer Engagement in a Virtual Environment

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04.12.23 : Abstract 1379

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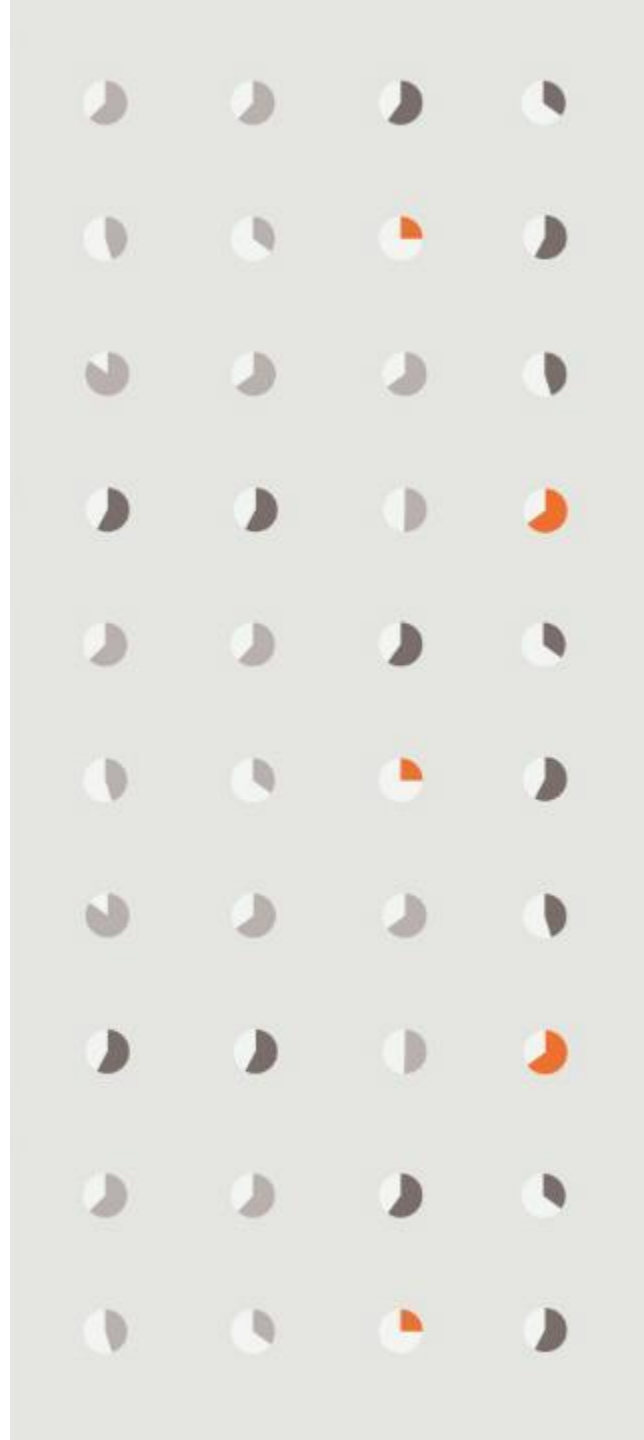
Agenda

01 Background of SCF Training

02 Virtual Training Delivery

03 Challenges & Reiterations

04 Successes & Moving Forward



Background of SCF Training

Why We Train our Field Interviews



Team Building



Project
Ownership



Information



Data Quality

Training Prior to SCF 2022



Virtual Training Delivery




HISTORICALLY




2022

What are the best practices of virtual training?



Overall

- Choose between synchronous, asynchronous, or blended learning.
- Give high level outline and bite-sized pieces.
- Use different methods, media, and tools of engagement.



Timing

- Build in engagement every 10 minutes.
- Keep sessions around 60 minutes (varied 45 to 90).



Interactions

- Keep breakout rooms to 10 people or less.
- Have co-facilitator(s).
- Set clear rules and expectations.

Tools of Engagement

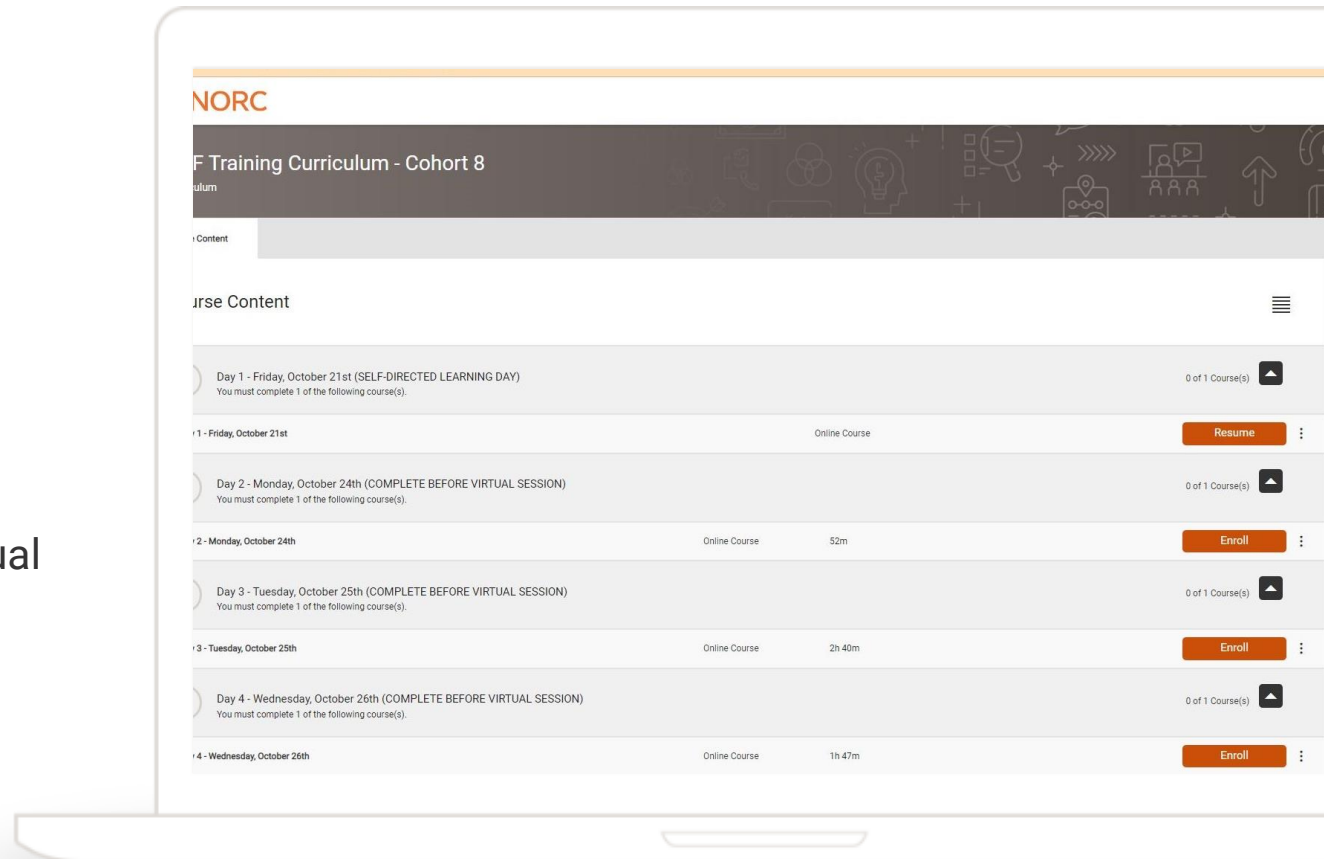


Absorb

- Used for independent and group activities
- Chose blended learning
- Gave high level outline and bite-sized pieces

Overall training curriculum was housed in Absorb.

- Gives FIs overall schedule and training outline
- Links to all the individual work



Tools of Engagement



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- Gave high level outline and bite-sized pieces



Articulate

- Used for independent activities
- Built in engagement every 10 minutes
- Used different methods and media

Meet Sven, Your SCF Expert!

Throughout your training courses, you will learn about each section on the SCF Questionnaire from Sven. Click on the Play icon below to start the video.

The interface shows a video player with a play button and a character named Sven. A sidebar on the left lists course topics: Meet Sven, Introduction to the Survey of Consumer Finances (SCF), Overview of the Interviewer Role, Learning Program Structure and Materials, and Check Your Understanding.

Narrated Videos

Click on each of the cards below to learn more about establishing legitimacy and ensuring confidentiality.

Below are some ways to establish legitimacy:

- Provide clear and honest information
- Encourage respondents to research NORC and the SCF
- Inform respondents on how to verify your role as an FI on the project
- Don't be salesy or pushy
- Convey the intrinsic value of participation

The interface shows a flash card with the text 'Ensuring confidentiality' and a list of ways to establish legitimacy. A note at the bottom states: 'Note that we will talk more about your role as an interviewer in the next lesson of this module.'

Flash Cards

Activity: Identifying Respondents

Making sure you are identifying the right person to complete the screener is crucial for collecting complete and high quality data. Click through the following scenarios to see how eligibility requirements are used in conversational situations.

The interface shows a video player with a play button and a woman in a blue shirt. A text box reads: 'Identifying Respondents. Work through the following scenarios to practice identifying eligible respondents. [Continue]'

Back and Forth Scenarios

Question 04/05

True or False: It is ok to interview whoever is most knowledgeable about the household finances, even if they are not an eligible respondent.

True

False

Correct

Knowledgeability is only a factor once eligibility has been determined. To be eligible, they must be the head of household. If there are two heads of household, ask who is most knowledgeable. If no head of household, ask who is on lease deed. If no heads of household and both on lease, then ask for person closest to US.

Knowledge Checks & Quizzes

Tools of Engagement



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Articulate

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- Built in engagement every 10 minutes
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Zoom

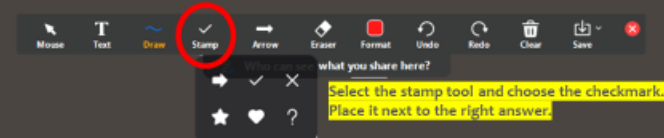
- Used for group activities
- Had co-facilitators
- Kept breakout rooms to 10 people max
- Kept sessions around 60 minutes
- Built in engagement every 10 minutes

Group days were run through PowerPoint and Zoom activities.

What is included in the advance mailings?



Activity: Annotate



Statement of Confidentiality
QR code with links to websites

Haggerty letter
Chairman letter
Junior

Data Security Handout
Sorry I missed you card

Haggerty letter
Senior

FRB Bulletin
Legit card

Tools of Engagement



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Articulate

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Microsoft Teams

- Used for small group communication
- Space for Question + Answer
- Opportunities for smaller chats, check ins, meetings, etc.
- Training ground for post training communication

Small group/team communications in Teams



Frankie Duda 8/17/2022 9:58 AM

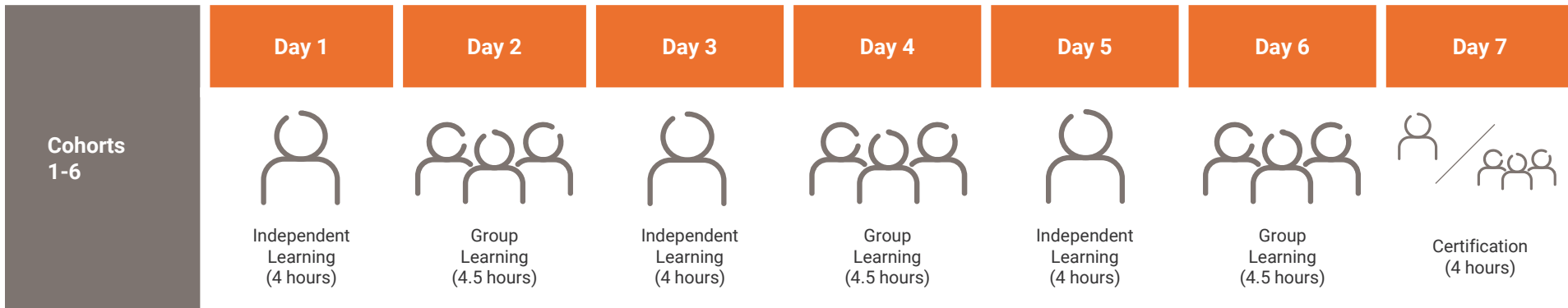
[NORCSuite and CAPI Issues](#) Is anybody finding that connecting to the VPN is slow of late?

▶ 8 replies from Mary, Caridad, Ceede, and 4 others

↩ Reply



Cohorts 1-6 Training Plan



Challenges & Reiterations

The Nature of Virtual Training



Distractions



Staffing



Comradery

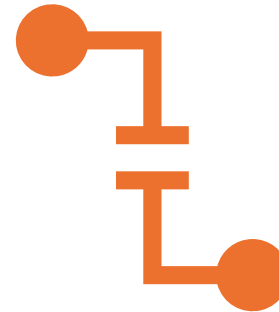


Commitment

Challenges We Could Address



Balance



Disengagement



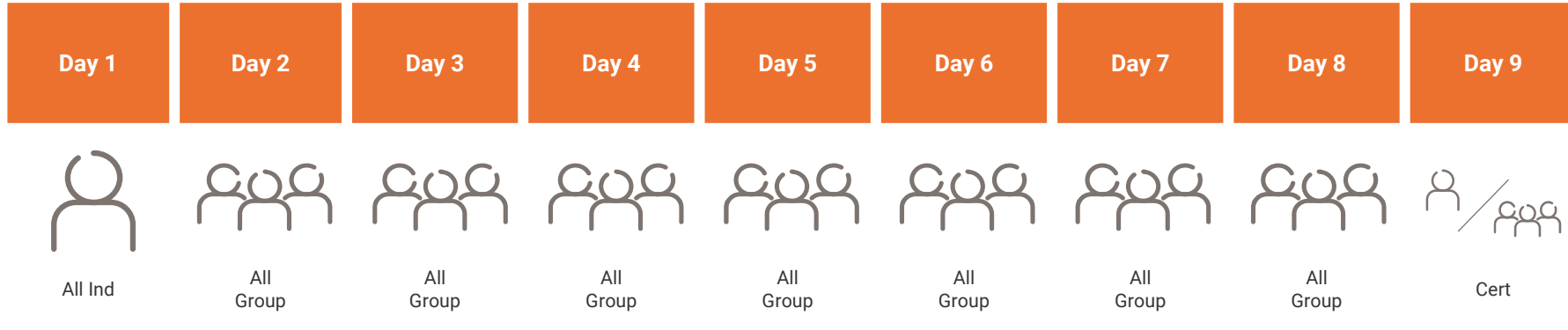
Tech Issues



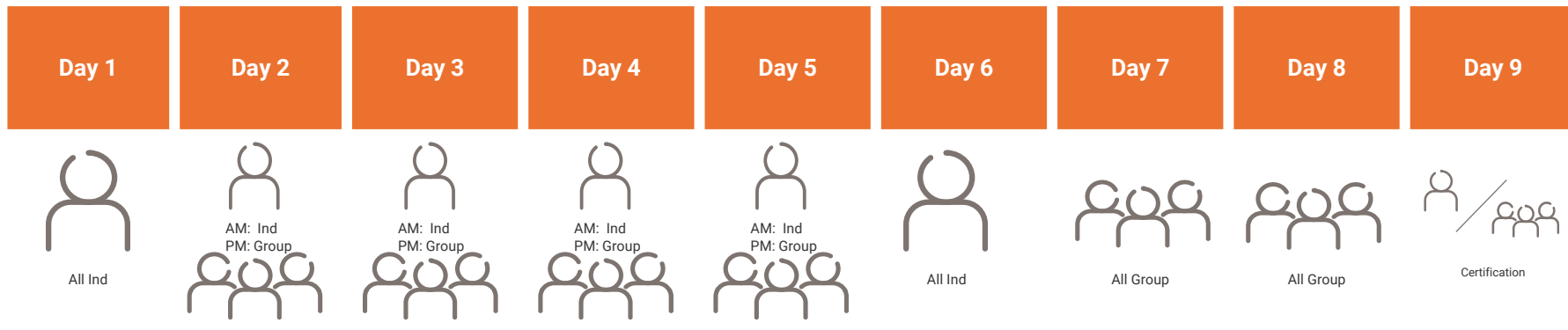
Individual Help

Cohort 7 and 8 Training Plan

Cohort 7

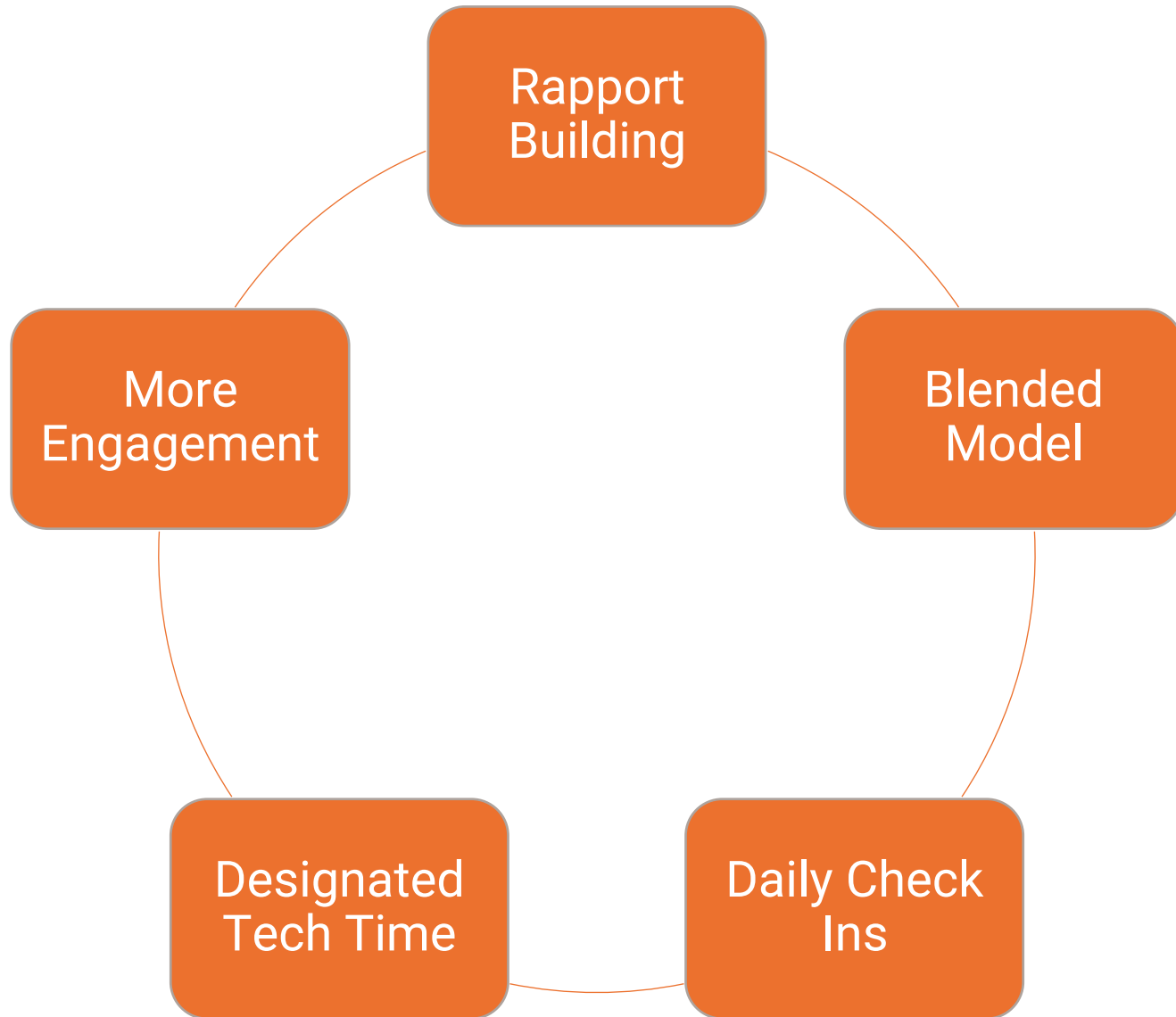


Cohort 8



Successes & Moving Forward

Virtual – Best Of



Hybrid - Best of Both Worlds



At Home Blended Work

- Overview + Basics
- Daily Touch Points

In Person Group Work

- Interpersonal Skills
- Technical Skills



At Home Blended Work

- Continued Learning
- Learn from Others

Thank you.

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 Research You Can Trust™

 **NORC** at the
University of
Chicago