

## V. Training & Dress Rehearsal

A well-trained staff is the foundation for quality data collection. Once study staff have been selected, your next consideration will be to train staff according to their job descriptions. Staff training manuals and other written materials will need to be created and training sessions will need to be designed and executed. Optimally, a survey dress rehearsal will be held, so staff have the opportunity to put their new skills to practice.

### A. Training Staff

#### 1. Manuals and Written Materials

Once all protocols and procedures for the study have been fully developed, these can be adapted to create manuals both for training, and as a reference for staff while on the job.

#### 2. Training Format and Trainers

Depending upon the components of the survey, it may be necessary to have a combination of

in-house and outside trainers. Once organizers have identified the training content required, they will need to create an agenda and decide who will lead the various training sessions. The trainers and study planners should consider which formats would be most effective for each topic. Some options include lectures, demonstrations, role-playing, small group work or a combination.

### NYC HANES Training Manuals

Before the start of training, NYC HANES staff, together with the National Center for Health Statistics (NCHS), developed a series of manuals that described the data systems, tools and procedures used for each job. Manuals included:

- **Central Office Procedures**
  - Scheduling appointments
  - Arranging transportation
  - Scheduling an interpreter
- **Clinic Operations**
  - Body measures and blood pressure procedures
  - Clinic coordinator procedures
  - Phlebotomy and urine collection procedures
  - Interview procedures
  - Physical exam procedures
- **Field Operations Procedures**
  - Completing the eligibility interview
  - Documenting household information
  - Refusal conversion

*To view the NHANES manuals and other materials, go to:*

[http://www.cdc.gov/nchs/about/major/nhanes/current\\_nhanes\\_01\\_02.htm](http://www.cdc.gov/nchs/about/major/nhanes/current_nhanes_01_02.htm)

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## NYC HANES Trainers

NYC HANES relied upon experts from NCHS for several aspects of staff training including field screening procedures, training related to the physical exam and taking blood pressure measurements.

Study organizers utilized staff from within the agency to conduct training on issues such as confidentiality and informed consent, emergency procedures for mercury spills, and safety in the field.

### 3. Training Schedule and Content

It is important to carefully think through the training schedule to most effectively use both staff and trainers' time. Depending upon the staffing model, your staff may have limited availability. Organizers should also consider which training components are applicable to all staff, and when to divide the staff into separate groups according to their jobs.

Depending on the length of the data collection period, study organizers may also want to plan a mid-study refresher training. This additional training opportunity will reinvigorate existing staff and provide a formal foundation for staff that may join the project throughout the study.

#### B. Dress Rehearsal

When planned and executed properly, a dress rehearsal serves as a critical bridge between the procedures introduced in training and the reality of working with actual survey participants. If the decision is made to have a dress rehearsal, it can involve either volunteers or actual community participants whose data will not be included as part of the study. A dress rehearsal will provide staff with an invaluable opportunity to test their skills, become familiar with procedures and work flow, and build confidence without worrying that their mistakes will jeopardize the data being collected.

### 1. Planning a Dress Rehearsal

The procedures that can be practiced during the dress rehearsal will include: locating selected households, completing the eligibility interview, making appointments for the exam, and all procedures associated with data collection. The coordination of a dress rehearsal will require significant planning. When thinking through a dress rehearsal, study organizers may want to consider:

- What are the critical elements that should be practiced?
- When will the dress rehearsal take place and how long it will last?
- How will the recruitment and examination dress rehearsals be coordinated?
- Who will be selected as dress rehearsal participants?
- Who will observe and evaluate the dress rehearsal?
- How will staff debrief from the dress rehearsal?
- What will the feedback mechanism be so that adjustments to procedures can be made?

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## NYC HANES Staff Training

NYC HANES Staff Training was divided into two phases to minimize disruption to the agency. Field and central office staff were trained in the first phase, clinic staff in the second. All staff members were provided with basic information about the survey, followed by more specialized training related to their particular function.

### Field Staff Training included:

Explanations and demonstrations of the field screening process

A “walk-through” on using the field operations manual, household folders and recruitment materials

Hands-on practice packing travel bags with materials needed in the field

Working on a 30-second and 60-second “pitch” to explain the study to potential study participants

Role-playing the interview process with various types of household participants

### Central Office Staff Training included:

Explanations and demonstrations of the field screening process

Practice answering, making and recording the results of phone calls

Using scripts to answer questions and schedule appointments

Instruction and practice on entering data from household folders

*[View: Training agendas and manuals*

*<http://www.nyc.gov/html/doh/html/hanes/section5.shtml>]*

### Clinic Operations Staff Training:

- **Clinic Coordinators:**

- Controlling and maintaining clinic flow

- Monitoring data quality

- Check-in and checkout procedures

- Informed consent forms

- Issuing remuneration

- Emergency protocols

- **Health Technicians:**

- Taking blood pressure and body measures using standardized methods

- Maintaining exam room equipment and supplies

- Conducting interviews

- Entering data

- **Phlebotomists and Lab Assistants:**

- Strategies for gaining study participant cooperation

- Maintaining equipment and supplies

- Standardized procedures for blood draw, urine collection and specimen preparation

- Labeling and processing of clinic specimens

- Data entry

- Infection control

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## **NYC HANES: Dress Rehearsal**

The NYC HANES' dress rehearsal was designed to mirror the actual survey as closely as possible. Field staff recruited and scheduled study participants from three extra segments designated for the dress rehearsal. At the clinic, dress rehearsal participants gave informed consent, completed all components of the survey, and received remuneration.

### **Field and Central Office Dress Rehearsal**

The field and central office dress rehearsals were scheduled in advance of the clinic dress rehearsal to allow the field screeners to complete recruitment and schedule participants for clinic appointments. All field staff was split into three large groups. Each group was assigned to a selected dress rehearsal segment, and given specific households to approach.

Over the course of several days, including evenings and weekends, field screeners approached their assigned households where they attempted to make contact, complete the household composition questionnaire, determine eligibility, and ultimately schedule a clinic appointment. During this same period the Central Office staff was available to receive calls from field screeners to schedule clinic appointments.

### **Clinic Dress Rehearsal**

The clinic dress rehearsal was scheduled one and a half weeks prior to the official opening of the clinics. The dress rehearsal took place in two phases.

#### **Phase I**

Phase I was a two-day period during which select DOHMH staff and local officials were invited to the clinic as guests. Each guest completed the interview and examination process. This phase gave staff a chance to practice procedures in a comfortable environment, and allowed key agency staff (the health commissioner, community relations and press office staff) to experience the NYC HANES survey.

#### **Phase II**

Survey participants from dress rehearsal segments were scheduled during the final three days. This phase gave staff additional practice and study planners time to monitor data collection procedures and make adjustments as necessary.

***[View: Dress rehearsal schedule***

***[http://www.nyc.gov/html/doh/downloads/pdf/hanes/HANES\\_rehearsal\\_sched.pdf](http://www.nyc.gov/html/doh/downloads/pdf/hanes/HANES_rehearsal_sched.pdf)***

## 2. “Debriefing” to Discuss Lessons Learned

Immediately after the dress rehearsal, organizers may want to hold a “debriefing session” to determine:

- What went well?
- What challenges came up and how they were handled?
- What additional practice was needed?
- Are any protocol changes warranted?

During the debriefing, it is important to get feedback from the entire survey staff. Study organizers should carefully consider staff comments to determine which issues can be handled with training and which require procedural changes. If adjustments to data collection procedures are necessary study planners should communicate these changes to all staff, and modify any documentation that may be referenced in the future.

### Debriefing from the NYC HANES Dress Rehearsal

During the NYC HANES dress rehearsals, NCHS staff were present to provide technical support and observe operations. They helped troubleshoot and advise staff about problems they observed. Senior NYC HANES staff also elicited feedback from DOHMH guests on how to improve the flow of the clinic and the performance of clinic staff. Some of the issues identified during the dress rehearsal were:

- Additional training was needed for field screeners in locating the correct house or apartment when the address provided was incorrect or did not accurately reflect the physical layout of an apartment building.
- Difficulties were identified in the management of the clinic flow. Clinic coordinators found that there were quiet stretches due to “no shows,” followed by a rush of study participants, causing long waits.
- Additional training was needed for several health technicians who failed to follow standardized interview and exam procedures.
- Additional training was needed for phlebotomists and lab assistants, regarding labeling conventions for blood and urine specimens.
- Communication resources were needed, as central office staff were unable to easily relay messages and other important information to field staff.

Once these issues were identified, survey managers worked to quickly resolve these problems. For example, further training and practice sessions were scheduled, field screener cell phone numbers were posted in the central office, and adjustments to appointment scheduling protocols were made.

### 3. The Final Details

If possible, planners should allow one to two weeks between the end of the dress rehearsal and the official start of survey operations. This time can be used for last minute adjustments to procedures, edits of manuals and other documents, and additional staff training and practice. During this time, organizers may also want to plan a kickoff press conference and mail survey information packets to the first neighborhoods to be recruited.

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#### **NYC HANES Final Details**

In the two weeks preceding the beginning of survey operations, NYC HANES staff worked with a local mailing house to send information packets to all selected households to be visited in the first month of recruitment. The information packet contained an “advance” letter signed by the commissioner and an informational brochure. The purpose of the packet was to:

- Explain the objectives and the value of the community HANES project
- Provide a brief description of the study
- Ask for resident cooperation when approached by field recruitment staff

NYC HANES staff also worked with the DOHMH Press Office to hold a kickoff press conference, and a press ride-along during the first day of field recruitment.