

Appendix FF
Agenda for Screener Training

Survey of Small Business Finances

Telephone Interviewer Screening Training Agenda

Module	Topic	Training Goals	Format	Trainer	Duration	Time
DAY 1						
1	Introductions and Objectives	Relax the training room by introducing the Screener interviewing staff to one another and to the key project staff through a simple icebreaker activity. Briefly explain the key objectives for the next two days of training.	Group activity	Carol	30 minutes	9:00 - 9:30 am
2	Study Purpose and Design	Introduce trainees to the purpose of the SSBF, the survey sponsor, the sample, and the study design. Mention that the study benefits small businesses; it is in the interest of respondents to participate. Briefly explain why it is important that those contacted participate; e.g. to minimize response bias. Acquaint interviewers with the new design features of the SSBF.	Lecture	John	45 minutes	9:30 - 10:15 am
	BREAK				15 minutes	10:15 - 10:30 am
3	Overview of Screening Process	Discuss why we are screening, and point out that not all firms will be eligible for the survey. Acquaint trainees with the five parts of the screening process: 1) identifying an appropriate respondent, 2) gaining cooperation, 3) determining whether the location contacted is the main office or headquarters, 4) determining firm eligibility, 5) collecting information about the firm in order to mail the appropriate version of the worksheet. Define key terms. Acquaint trainees with the questions in the screening interview, and the QxQs. Explain the different company types. Explain how to handle firms with zero employees.	Lecture	Carol	90 minutes	10:30-12:00 pm

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	LUNCH				30 minutes	12:00 – 12:30 am
4	Eligibility Criteria (cont.) and Identifying Appropriate Respondents	Provide trainees with more practice in applying the eligibility criteria. Help trainees understand the importance of interviewing an owner or an appropriate proxy. Discuss the qualifications of an appropriate proxy. Discuss inappropriate proxies. Explain the requirement to make three attempts to speak with the owner before accepting a proxy.	Lecture and Exercises	Bob	30 minutes	12:30 - 1:00 pm
5	Respondent Confidentiality	Review importance of safeguarding respondent confidentiality and the interviewer's role in doing so. Review the contents of the advance materials mailed to respondents, focusing on the confidentiality statements contained in each. Practice reading the confidentiality statement in the survey introduction. Practice responding to respondent concerns about confidentiality.	Lecture and Round Robin	Carol	30 minutes	1:00 – 1:30 pm
6	Using Survey Craft Telephone Number Management System	To acquaint trainees with the TNMS: its purpose, how it works, and how to use it effectively. To help trainees understand the importance of assigning disposition codes correctly and writing complete call notes, and to give them practice in doing both activities	Lecture/ Exercises	Bob	45 minutes	1:30 – 2:15 pm
	BREAK				15 minutes	2:15 – 2:30 pm
7 & 9	Mock Screening Interviews #1 & 2	To practice the 3-attempts rule to reach the firm owner (Mocks #1a to #1c), and to familiarize trainees with the CATI version of the screening interview.	Round Robin in Call Center	Toni & Troy	45 minutes	2:30 – 3:15 pm

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8	Gaining Cooperation -- Part 1	To introduce trainees to the techniques used to gain respondent cooperation and familiarize them with the Answers-to-Frequently-Asked-Questions Job Aid	Lecture/ Round Robin	Bob	45 minutes	3:15 – 4:00 pm
10	Wrap Up Day 1	Summarize the main points from Day 1. Review agenda for Day 2. Explain Homework for Day 1. Note earlier start time on Day 2.	Lecture	Carol	30 minutes	4:00 – 4:30 pm

Module	Topic	Training Goals	Format	Trainer	Duration	Time
DAY 2						
11	Review of Day 1	Summarize the main points from Day 1. Answer Trainee questions on Day 1. Review agenda for Day 2	Lecture	Carol	15 minutes	8:30 – 8:45 am
12	Gaining Cooperation, Part 2/ Respondent Incentives	To provide trainees with additional practice in gaining respondent cooperation, and to acquaint them with the respondent incentive options and how to describe these to respondents. Interviewers will be expected to present the FAQ's and explanations of the incentives in their own words. Discuss inappropriate techniques, e.g., calling from the FRB, paying Rs to participate.	Round Robin	Bob	60 minutes	8:45 – 9:45 am
13	Respondent Worksheets	To familiarize trainees with the purpose and content of respondent worksheets. To give trainees practice in explaining to respondents that we will be mailing them a worksheet and calling them back to conduct the main interview. To help trainees understand how the screening interview data are used to determine which version of the respondent worksheet to mail.	Lecture/ Exercises	Carol	30 minutes	9:45-10:15 am
	BREAK				15 minutes	10:15-10:30 am
14	Duo Mock Screening Interviews 3 & 4	To provide interviewers with further practice in gaining respondent cooperation, explaining the incentive options, answering respondent questions, independently administering the CATI interview and using the QxQs, explaining the worksheet mailing, and setting the appointment for the main interview. When playing the role of the respondent, each interviewer will work from a different script.	Duo Mocks in Call Center	Toni & Troy	60 minutes	10:30–11:30 pm

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15	Question & Answer Period	To give trainees an opportunity to get any remaining questions answered.	Group Discussion	Carol	30 minutes	11:30 – 12:00 pm
	Lunch				30 minutes	12:00-12:30pm
16	Production Goals and Performance Evaluation	To inform trainees of the production goals for the study and how their performance will be evaluated.	Lecture	Bob	30 minutes	12:30 – 1:00 pm
17	In-class Certification Quiz/Training Evaluation	To assess the effectiveness of the training. Quiz will cover the major topics of training, including the purpose of the survey, the survey sponsor, the source of the sample, the eligibility criteria, the purpose of screening, the purpose of the worksheets, and the respondent incentive options available.	Exercise/ Discussion	Carol	30 minutes	1:00 - 1:30 pm
18	Wrap-up	To provide closure to the training and inform interviewers of the schedule for the Certification Mock interviews.	Discussion	Carol	15 minutes	1:30 - 1:45 pm
19	Schedule Certification Mock Interviews with Supervisors	To certify that each interviewer has acquired the necessary knowledge and skills to effectively screen businesses for this survey.	Conversation with supervisor	Toni & Troy	15 minutes	1:45 – 2:00 pm