

# Field Interviewer Training: Calibrating Delivery Modes

Balancing Tradition with Innovation During  
Unprecedented Times: Lessons from the  
2022 Survey of Consumer Finances

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04.16.2024

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Beyer, Nelson

# Agenda

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**01** Setting the Stage

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**02** Past SCF Trainings

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**03** Ideal Hybrid Training Model

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# Setting the Stage

# Important background

- FRB really cares about training
  - “Interviewer hiring and training are among the most important activities in a survey.”
  - “Stay out of the emergency room!”
- On-the-spot-first-attempt completes are rare
  - Contact Form
  - Respondents increasingly hard-to-reach
- SCF questionnaire requires commitment and trust
  - Median: 121 minutes
  - Concerned about theft of financial information

# COVID changed things

## Hiring and retaining interviewers is a challenge

- Specialists necessary
- Focus on retention



Phone Specialists



Travel Specialists



Bilingual Specialists



Upper List Specialists

## Experience with fully remote training

- Improved technologies
- Near universal acceptance

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# Past SCF Trainings



**2019 and Prior – In Person**



**2022 – Remote**



**Hands-On Tech**



**Role Play**



**Comradery**



**Commitment**





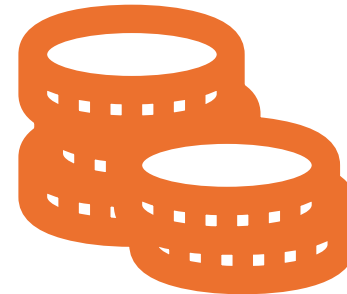
**Flexibility**



**Spread Out**



**Tailored Learning**

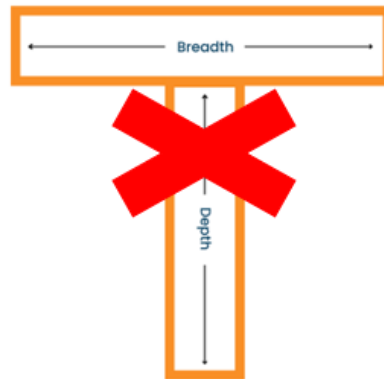


**Cost Savings**

# Same fatal flaws



**Information Overload**



**Covered Everything Broadly**



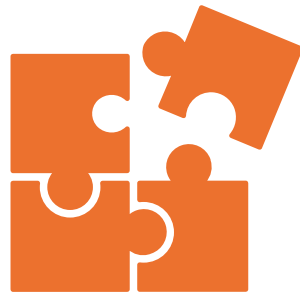
**Gaining Cooperation Skills Lacking**



**Data Quality**



**Team Building**



**Staged and  
Fit for Purpose**



**Prepared and  
Confident FIs**

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# Ideal Model for 2025 SCF



**New to NORC  
Interviewers**



**New to SCF  
Interviewers**



**SCF Experienced  
Interviewers**

Phase 1	Phase 2		Phase 3	Phase 4
Refresher Training	Initial Training		Skill Development	Continuous Learning
SCF-Experienced	New to NORC and New to SCF			All Interviewers
Remote	Remote	In Person	Remote	Remote

# Refresher Training

## Content Covered

- Project-Specific Information
- New Tech and Tools
- Updates to Project
- Topical Specialist
- Certification



SCF-Experienced Interviewers



Phone Specialists



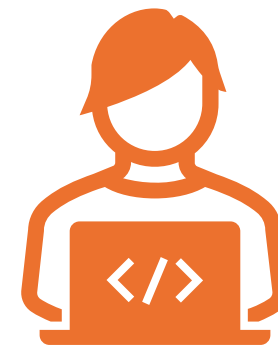
Travel Specialists



Bilingual Specialists



Upper List Specialists



Fully Remote

# Initial Training

## Content Covered Remotely

- Intro to Project and Role
- Data Quality
- Sample Design
- Screening

## Content Covered In Person

- Role Playing Scenarios
- Tech and Tools
- Security
- Mock Interviews
- Certification



New to NORC and  
New to SCF Interviewers



Half Remote and  
Half In Person



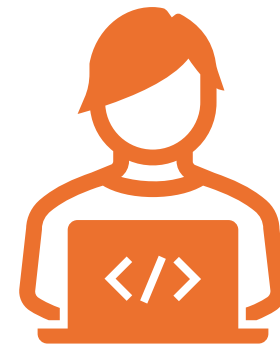
# Skill Development

## Content Covered

- Questionnaire
- Refusal Conversions
- Optional Topical Specialist
- Certification



New to NORC and  
New to SCF Interviewers



All Remote

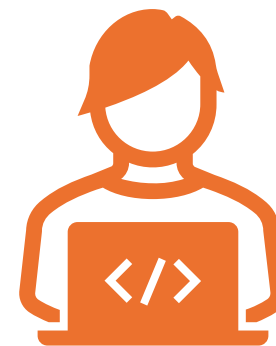
# Continuous Learning

## Content Covered

- Weekly Project Memos
- Special Topic Group Sessions
- Regional Calls
- One on One Calls



All Interviewers



All Remote

# Thank you.

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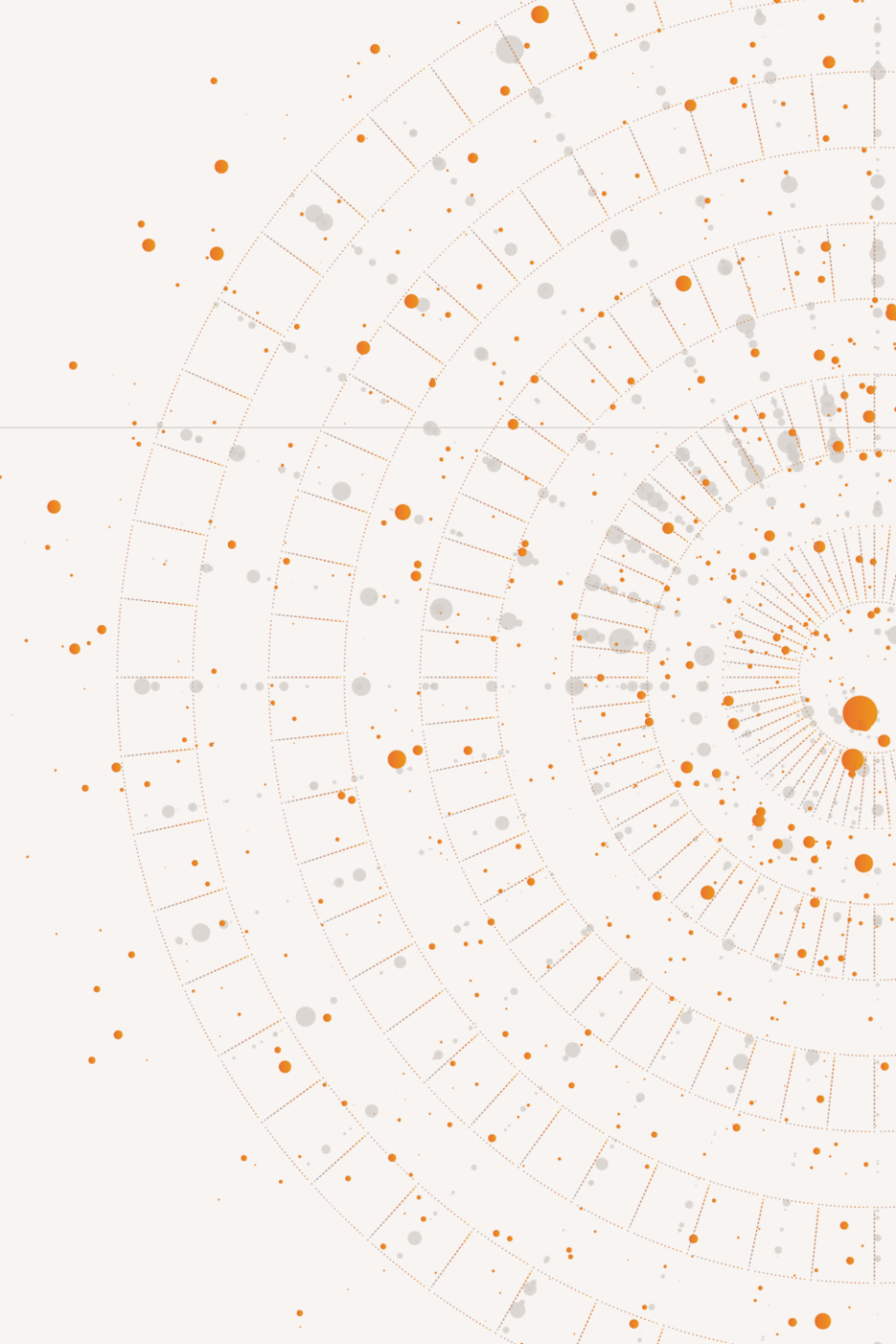
 Research You Can Trust™

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 **NORC** at the  
University of  
Chicago

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Questions?





### **Risk Mitigation**

- Limit Build-up of Cases
- Consistent Communication between Teams



### **Retention**

- Employee Resource Groups
- Specialized Assignments
- Highlighting Accomplishments
- Teambuilding Events
- Company Benefits



### **Attrition**

- Monitor Staffing by type and location
- Share Interviewers
- Backlog of Potential Candidates