

6 The SHARE Train-the-Trainer Program

Kirsten H. Aleser and Grant Benson

6.1 The SHARE Training Model

SHARE contracted with the Survey Research Center (SRC) at the University of Michigan's Institute for Social Research for the development of the SHARE training program and interviewer project manual to be used in the training of interviewers. The purpose was to ensure cross-national comparability within SHARE as well as comparability with the U.S. Health and Retirement Study (HRS) conducted by SRC.

SRC has conducted survey research for over fifty years and is the oldest and largest academic-based survey research institution in the U.S. SRC trains all of its interviewers itself and has developed a reputation for excellence in training as well as in quality control procedures. SHARE emphasised interviewer training and process documentation to ensure consistent, high data quality.

SHARE utilised a train-the-trainer (TTT) program approach to facilitate decentralised training in the member countries. Thus, SRC created a training program for use by country level trainers and provided training for the trainers. The TTT program was scripted for ease of use and consistent cross-national implementation in subsequent training sessions by local survey agencies. The TTT program also provided specific training resources, including an Interviewer Project Manual; a Facilitator Guide with power point slides and training scripts; a CD-based training on gaining respondent cooperation; and training videos to illustrate (a) the correct interpretation and recording of call attempts, and (b) the administration of physical measurements. SRC furthermore collaborated with CentERdata of the Netherlands in the development of a computer-based tutorial on the SHARE case management system (CMS) and worked with the Mannheim Institute for the Economics of Ageing (MEA) on development and implementation of training evaluation protocols and sample management monitoring.

The SHARE TTT program trained trainers as if they were the interviewers. First, this afforded the trainers a better appreciation of interviewer needs and difficulties and, thus, allowed them the opportunity to strengthen their own training in areas anticipated to require additional training. Second, this was the best way for trainers to familiarise themselves with the SHARE survey requirements. Finally, the optimal goal of this approach was to ensure standard interviewer behaviour across all member countries to increase comparability of data collected for SHARE.

6.2 SHARE Training

6.2.1 The Trainees

Each country sent 2-3 trainers from the participating survey agency to each TTT session. In addition, the Country Team Leader (CTL) and his or her Operator participated, both to provide support and motivation and to familiarise themselves with the expectations for interviewers and the SHARE field work norms. The TTT training was conducted in English, and the translation of the training materials was the responsibility of the survey agencies with input from CTLs or Operators as needed.

6.2.2 TTT Development

SHARE conducted a total of three Train-the-Trainer sessions. The first was in preparation for the pilot study and took place in May 2003. This was a two-day,

comprehensive training covering all major aspects of general interviewing techniques, study specific procedures, and survey administration. The second TTT built upon the pilot training and was conducted in December 2003 in preparation for the pretest. This was a day-and-a-half training focusing on changes to study protocols and instrument changes. The final TTT took place in April 2004 and was a one-day training focusing on two key points: Gaining respondent cooperation and developing an agenda for a full, two-day local interviewer training for the main survey.

Each Train-the-Trainer session included an updated, complete Interviewer Project Manual, a scripted training, and specific guidelines for procedures that interviewers must follow in each country to ensure cross-national comparability of the results. Local survey agency trainers evaluated each TTT in writing, assessing whether it prepared them adequately for local training sessions, whether the materials were helpful, and where the training could be improved. The feedback from the pilot and pretest trainings were used to develop the agenda for the final SHARE interviewer training in participating countries.

6.2.3 Length of Training

The initial and most complete training was provided in preparation for the SHARE pilot (May 2003). It contained a separate section on General Interviewer Techniques (GIT). GIT is provided to all new interviewers at SRC before they receive specific training on the study that they will be working on. This training includes standardised question-asking, probing and feedback conventions, and collecting process data information, including when contact was attempted and what the result of each contact attempt was. The purpose of including a GIT component in this training was to establish a baseline against which all subsequent training would take place. Indeed, feedback on the training revealed significant variability among survey agencies, with about half of the agencies insisting that this was common practice and did not require repeating, while the other half of the agencies expressed appreciation for receiving general guidelines for survey implementation. Subsequent SHARE training omitted a separate section on GIT but integrated into the study-specific training those elements of GIT that minimally must be carried out by interviewers to ensure consistent, high quality data collection.

The training sessions for both the SHARE pretest (December 2003) and the main SHARE data collection (April 2004) were shorter. These two training sessions were, therefore, not complete training sessions but supplemental training in areas not covered in the pilot training session (e.g. the CMS, the self-completion questionnaire) or a demonstration of refinements to certain protocols, e.g. the grip strength and walking speed tests, cognitive tests, and proxy interviewing.

Some survey agencies were reluctant to plan for two days of training for a variety of reasons, primary among them being cost and break with traditional approaches. However, after evaluating comparability of survey administration and interviewer feedback from the pilot and pretest, it was decided that the complexity of the SHARE project warranted a more comprehensive training. As a result, most countries did schedule a two-day training of interviewers who would be working on the SHARE project.

6.2.4 Content of Training

A proto-type agenda for a two-day training was developed covering all essential topics of a SHARE training program. Table 6.1 below lists each topic and a brief note describing its purpose, as well as time assigned to training on that topic. The

result is a comprehensive training plan requiring a total of 12.5 hours of training net of breaks to be inserted as needed throughout each day.

A key reference source was the SHARE Interviewer Project Manual. This manual supplemented the two day training by providing a comprehensive reference to all of the SHARE protocols, including those GIT conventions minimally required by SHARE. In addition, it was important that agencies either emulate the complete mock respondent interview created by SRC or create their own. This mock covered situations that deliberately exposed the interviewers to difficult areas of the instrument.

A favourite and very helpful tool used in the Train-the-Trainer program and recommended for individual agency training sessions was the use of the Question Cards. These cards were made available throughout training for trainees to write questions that could not be accommodated on the spot due to intensity of training. During breaks and at the end of the day, these questions would be shared with the entire group and answers provided so that everyone received the same information.

6.3 Summary

The SHARE Train-the-Trainer program was created with the following purpose in mind:

- to ensure consistency across survey agencies
- to obtain results that are generalizable
- to obtain results that are comparable.

The SHARE TTT was an iterative process, starting from the SRC training model but adapted to the European situation through active participation and feedback from country level trainers. Specific guidelines and conventions deemed necessary for the cross-national survey were maintained, enabling the analysis of results across the European member countries.

Acknowledgements

The authors wish to thank the following persons and groups for their contributions to the development of the Train-The-Trainer Program created specifically for SHARE: Beth-Ellen Pennel, Nicole Kirgis, Shonda Kruger Ndiaye at the Survey Research Center, the Country Team Leaders and survey agencies in the SHARE member countries.

Table 6.1 SHARE Two-Day Main Survey Model Agenda

Topic	Purpose	Length (Minutes)
DAY 1:		
Introductions, welcome, logistics	Setting the stage for this intense training	15
SHARE project and questionnaire overview	Goals of the project	45
Laptop overview and instrument installation check	Familiarising interviewers with the laptop	30
Overview of Case Management System	How to operate the SHARE electronic case management system, assigning result codes, entering Call Notes Introduce non-contact mock scenarios to test results	75
Overview of the Blaise program	Blaise components, including location on computer screens of question text, response options, data entry, interviewer instructions	45
SHARE questionnaire walk-through (scripted mock scenario recommended): First half session	Special Blaise application features (e.g. using keys vs. mouse, entering a remark) Use of show cards Identification of sections that do not permit proxy administration Special coding conventions used in the Mental Health section	150

Table 6.1 (continued)		SHARE Two-Day Main Survey Model Agenda	
Topic	Purpose	Length (Minutes)	
DAY 2:			
Question and Answer period	Answer questions from interviewers	15	
SHARE questionnaire walk-through (scripted mock scenario recommended): Second half session	Physical measurements (include videos of Grip Strength and Walking Speed measurements) Use of Interviewer Recording Booklet Coding conventions used in the Assets/Consumption sections (e.g. unfolding brackets; the handling of pre- or non-Euro currency data) Self-completion questionnaire and procedures	120	
Proxy interviews	When and how to do them	45	
Importance of response rates	Explain the importance of working the sample completely to decrease non-response; importance of representativeness in the random sample	30	
Approaching the household	Emphasise professionalism and readiness to prove legitimacy Provide guidance in how to identify best time for initial and all contact attempts	60	
Practice using the Case Management System	Using scripted mock scenarios, enter contact attempts on several sample lines and review resulting optimal interviewer strategies	60	
Gaining respondent cooperation	Review the eight concerns that interviewers are likely to encounter Practice quick answer to several concerns Refer to CD on “Gaining Cooperation”, which contains video clips, scripts and self-tests	60	
Total time in training (excluding breaks):	Day 1: 6 hours; Day 2: 6.5 hours	Grand Total: 12.5 hours	