Survey Helper Training Session 2: Giving the Survey to Clients/Caregivers in an Interview Format

Introduction
This is an approximately one-hour session for survey helpers who will be giving the survey to clients and caregivers in an interview format. This training is intended as a supplement to the previous training that introduces survey helpers to the surveys and their role as helpers, “Survey Helper Training Session 1: Giving the Survey to Clients/Caregivers to do on Their Own.” “Interview format” means reading survey questions and answer choices to the client/caregiver, and marking down the answers the client/caregiver chooses. Survey helpers would not be choosing answers for the client or caregiver. ¹

An interview format would be used to:

- Assist clients and caregivers who would have difficulty filling out a survey on their own because of low literacy or vision, for example;
- Give the survey to a client or caregiver over the telephone; or
- Give the survey to a client or caregiver in person using a mobile device, where the survey helper marks down their answers into a survey form online.

This session is primarily aimed at survey helpers who will meet with the client or caregiver in person. For additional information on preparing survey helpers to give the survey over the telephone, see Appendix J.

This session does not provide instructions on using a mobile device. If survey helpers will be using a mobile device to enter survey answers onto an online form, schedule some additional time to demonstrate how to access the survey and complete the online form.

Note that Senior Companion volunteers should never interview their own clients and caregivers, although they may assist other volunteers’ clients and caregivers.

Depending on how you are giving out the survey, and how many clients or caregivers may need the survey read to them, you need only train a small group of staff/volunteers for this task. This group should be motivated and able to complete the tasks as instructed, and be familiar with the surveys.

This session may be used “as is” or adapted to fit your needs.

¹ If clients are unable to complete a survey, a family member or caseworker can do the survey for them. For example, a client with severe cognitive impairment could have a close family member complete the survey, if available. Survey helpers would not do a survey for a client.
Learning Objectives
By the end of the session, participants will:

• Understand the steps involved in giving the survey to clients and caregivers, including how to protect confidentiality;
• Be able to help clients and caregivers feel comfortable and give honest answers; and
• Be able to read survey questions in a natural and neutral way that will not bias their answers.

Materials
Optional PowerPoint slides with abbreviated notes are available to use with this presentation at www.nationalserviceresources.gov/scp-surveys.

Participants will need a copy of the SCP Independent Living Performance Measure Survey and each of the following handouts:

• Survey Helper Instructions for Interviewing Clients/Caregivers
• Exercise Worksheet: Survey Helper Practice
• Tips for Reading the Survey

These handouts are included on pages 35-37. Participants should also have their Survey Helper Packets (from session 1) handy.

This symbol ‡ will cue you as to when to give out the handouts during the session.
Sample Agenda: Session 2
Below is a sample agenda with estimated times for each section.

This is only one way to prepare staff and/or volunteers to be survey helpers. Revise the session to fit the needs of your audience.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Estimated Time</th>
<th>Method</th>
<th>Slide # (optional)</th>
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<tbody>
<tr>
<td>Welcome</td>
<td>5 min.</td>
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<td>1</td>
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<tr>
<td>Learning Objectives</td>
<td></td>
<td>Lecture</td>
<td>2</td>
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<tr>
<td><strong>Interviewing Clients and Caregivers</strong></td>
<td>15 min.</td>
<td>Lecture; large group</td>
<td>3</td>
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<tr>
<td>• What is an Interview Format?</td>
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<td>• Honest Answers</td>
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<tr>
<td>• Survey Helper Instructions</td>
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<td><img src="image" alt="Survey Helper Instructions for Interviewing Clients/Caregivers" /></td>
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<tr>
<td><strong>Exercise : Survey Helper Role Play</strong></td>
<td>40 min.</td>
<td>Role play in pairs; Large group debrief</td>
<td>7</td>
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<td><img src="image" alt="Exercise Worksheet: Survey Helper Practice" /></td>
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<td><img src="image" alt="SCP Independent Living Performance Measure Survey" /></td>
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<td><img src="image" alt="Tips for Reading the Survey" /></td>
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<tr>
<td><strong>Closing</strong></td>
<td>5 min.</td>
<td>Large group discussion</td>
<td>8</td>
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<td>Final questions</td>
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Facilitator Notes

**Welcome**
Welcome participants to the training. (Show slide 1.)

Explain that this will be an extension of the previous training that introduced them to the surveys and the survey helper role. This session will focus on how to give clients and caregivers the survey in an interview format.

**Learning Objectives**
Describe the learning objectives. (Show slide 2.)

By the end of the session, you will:

- Understand the steps involved in giving the survey to clients and caregivers as an interview;
- Be able to help clients and caregivers feel comfortable and give honest answers; and
- Be able to read survey questions in a natural and neutral way that will not bias answers.
Tell participants when they would be collecting surveys, and how many. For example, “We have 22 clients and two caregivers that will need someone to read the survey to them. We hope that each of you can give the survey to about five people over the next two weeks. We will work with you to schedule the times in advance.”

**Interviewing Clients and Caregivers**

**What is an Interview Format?**
What do we mean by an interview format? (Show slide 3.)

Tell participants that an **interview format** involves reading the questions and answer choices to the client or caregiver, and marking down their responses. An interview format would be used for clients and caregivers who need assistance to complete the survey because they have difficulty seeing, reading, or writing. It would also be used if the survey helper was going to give the survey over the telephone, or input the answers into an online survey on a mobile device.

**Honest Answers**
Remind participants that the surveys ask some questions that are personal. When survey helpers read the questions, they should keep in mind that clients and caregivers may not feel comfortable being completely honest. (Show slide 4.)
Survey helpers can reassure the person by telling him/her that honest answers are what matter. No one is judging them. They are not being asked to do the survey to make the agency or project look good or to make the Senior Companion look good. There are no right or wrong answers.

Tell participants that another reason the clients or caregivers might not give honest answers is if they feel they are supposed to answer one way or another. Survey helpers could accidentally give this impression simply by the way they read the questions. (Show slide 5.)

To prevent this, the survey helper will need to:

- Read in a neutral manner, and do not offer opinions even if asked.
- Read the questions and all answer choices first, and then mark the client or caregiver’s answers.
- Read the questions and answer choices exactly as written, and in the order they are written.
- Be careful not to rush through the survey, and allow the client or caregiver enough time to think about a response.

Give an example of a reworded question or answer choice so participants understand what NOT to do. An example will help them understand how rewording a question might change the meaning and influence the person’s answer (“Would you say you are getting to the doctor enough these days?” instead of “Because of the Senior Companion Volunteer, I am able to get to medical appointments”).

Give an exaggerated example of how not to read a question or answer choice so they understand how this might influence a person’s answer (“Would you say you strongly disagree, somewhat disagree, Somewhat Agree, or STRONGLY AGREE!?“). Then, read the same question in a neutral tone.
Last, remind participants that the survey is confidential: “As a survey helper, you will know the person’s name and hear their answers. Please respect their privacy and do not discuss the interviews with anyone.”

**TIP: Keep the training interactive.** For example, before you move on to a new topic, call out a question to the large group that gets them thinking about it. (“What else might affect how a client or caregiver answers a question?”) Often they will have ideas that anticipate your next point. Reinforce the information presented: “What would you do if a client asks you what they should say?” “What do you think about ...” This also promotes discussion and peer learning.

**Survey Helper Instructions**

Give everyone a copy of the *Survey Helper Instructions for Interviewing Clients/Caregivers.*

(Show slide 6.)

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**Survey Helper Instructions for In-Person Interviews**

Client/Caregiver should be expecting you and already know a little about the survey.
1. Tell the person about the survey.
2. Do they have questions?
3. Are they willing to do a survey?
4. If yes, remind them that honest answers are important. (If no, that’s okay.)
5. Tell them you will read each question and the answer choices’ll be, and then mark down the answer they want.
6. Put the finished survey in the envelope and seal it.
7. Return the envelope to staff person you expect to.

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Read through each step and make sure everyone understands the procedures. Remind participants that they should use the *Survey Fact Sheet* in the *Survey Helper Packet* they received during the session 1 training to introduce the survey to clients/caregivers and answer their questions.

Give participants as much information about the interviews as you can at this point. For example, tell them:

- Whether most interviews will be with clients or caregivers;
- What to expect as far as the types of limitations clients/caregivers have (vision, literacy);
- Who will schedule the meetings or telephone calls with clients/caregivers and when;
- What will this person tell the client/caregiver about the survey; and
- When you hope the interviews can happen.
**Exercise: Survey Helper Role Play**

The purpose of this role play exercise is to get participants comfortable with assisting clients and caregivers with a survey. The exercise will take about 40 minutes in total, and everyone should get a chance to be the “survey helper”.

You will need the following three handouts, one for each participant:

- *Exercise Worksheet: Survey Helper Practice*
- *SCP Independent Living Performance Measure Survey*
- *Tips for Reading the Survey*

(Show slide 7.)

Instructions:

1. Give everyone a copy of the first two handouts: *Exercise Worksheet: Survey Helper Practice* and *SCP Independent Living Performance Measure Survey*.
2. Invite participants to get into pairs. Let them know that everyone will get a chance to practice giving the survey with a partner.
3. Each pair should choose who will be the “survey helper” and who will be the “client” for the first role play practice.
4. Read the “Role Descriptions” on the worksheet to the group.
5. Ask the pairs to do the survey together, in their roles. This should take about 10 minutes.
6. After they have finished the survey, ask them to switch roles and do it again. After 10 minutes, ask everyone to stop.
7. Have them take a few minutes to individually answer the “Feedback” questions on their worksheets.
Debrief:

Use this debrief time (about 15 minutes) to reinforce good practices.

1. Call the group together and ask them to refer to their notes on the worksheet.
2. Ask what they thought their partner did especially well as the survey helper (question 1).
3. Ask for a show of hands on question 2: “How many understood all the questions and answer choices when you heard the survey helper read them?” For those who did understand everything, ask them to describe how the survey helper read that was helpful. For those who didn’t understand everything, ask them what might have made it easier.
4. Go through questions 3 and 4 in a similar way, encouraging useful feedback from the group.
5. If there is time, ask the survey helpers if they thought the experience was easier or more difficult than they thought it would be.

Give everyone a copy of the handout, Tips for Reading the Survey. Encourage them to jot down additional tips they want to remember from the discussion today. Use the tips in the handout to reinforce points made during the discussion.

TIP: Reinforce peer learning. Write participants’ good ideas on an easel pad when you do a “debrief” discussion. This helps people remember important points and encourages them to share practical suggestions.
Closing

Be sure to ask if anyone has any final questions. (Show slide 8. You may want to add contact information for the person who will answer any future questions to the slide.)

Remind participants to talk to the staff person they usually report to about any questions they have in the future. If possible, offer to do more role plays for anyone who wants more practice, or encourage the participants to get together and practice.
Survey Helper Instructions for Interviewing Clients/Caregivers

Below are instructions for assisting clients/caregivers to do the survey by reading the questions and marking down their answers. Ideally, the client or caregiver will be expecting you when you arrive.

You will need:
- a copy of the survey
- an envelope; and,
- a pencil or pen.

1. Tell the client or caregiver about the survey by reading “Introduce the Survey” from the Survey Fact Sheet in the Survey Helper Packet.

2. Ask if he/she has any questions. (If yes, give the answers that are on the Survey Fact Sheet.)

3. Ask if he/she is willing to do the survey. You can ask if they would like to see the survey first.

   If yes, continue.

   If no, that’s okay. At this point, you are done. Let the staff person you usually report to know that they decided not to do the survey.

4. Tell the client/caregiver that honest answers are most important. “We are not doing the survey to make [agency or project name] look good, and no one will know who your Senior Companion is because there are no names on the survey. We are looking for honest answers.”

5. Tell them what you will do (“I will read each question and the answer options first, and then mark down the answer you say”), and then go through the survey.

6. When the survey is finished, put it into the envelope and seal it. Remind the client/caregiver that their responses are confidential and you will not share them with anyone.

7. Return the sealed envelope to the staff person you report to.
Exercise Worksheet: SURVEY HELPER PRACTICE

Instructions

1. Decide who will be the Survey Helper and who will be the Client first.
2. Read the “Role Descriptions” below, and complete the survey together.
3. Switch roles and do it again.
4. When you have finished, answer the “Feedback” questions.

Role Descriptions

Survey Helper: You will need to:

• tell the Client about the survey;
• answer any questions as best you can; and,
• assist with the survey by reading the questions and marking their answers.

Client: You are surprised to hear about this new and interesting survey! You are willing to do the survey, but you might have a few questions first.

Feedback: Think about how you felt when you were the Client or Caregiver hearing the survey...

1. What did the Survey Helper do that worked especially well? ______________________

2. Did you understand the questions and answer choices when you heard the Survey Helper read them? Yes No

If no, what would have helped you? ____________________________________________

3. Did the survey feel like it was moving at a comfortable pace?
   Just right Too slow Too fast

4. Did you ever feel like the Survey Helper wanted you to answer a question in a certain way? Yes No

If yes, why did it seem like that? ____________________________________________
Tips for Reading the Survey

- Read the entire question and answer choices first, and then mark down the client/caregiver’s response.
- Ask questions as they are written, and in the same order. Do not put questions into your own words.
- Do not skip questions.
- Be aware of how you sound. Read clearly so you are understood.
- Read in a neutral manner so the person doesn’t think they are supposed to answer one way or another.
- Do not offer your opinion about the survey.
- Do not suggest an answer. This is tempting to do when someone is slow to answer, but give them time.
- Take your time. Move through the survey at a pace that seems comfortable.
- Use your best judgment. If you think the client/caregiver is getting frustrated or having trouble understanding the questions, stop the survey as if it were finished. Tell the staff person you report to what happened later.

Notes:

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