



**NATIONAL CORE
INDICATORS**
NASDDDS & HSRI

NCI Training and Reliability Best Practices

Framework for Training

What trainings are applicable to you

NCI Led Trainings

On-site Trainings

Primarily, the NCI team* delivers on-site training to:

- New states
- States with completely new set of surveyors
- States with identified need through work plan review and discussion.

*staff from HSRI and NASDDDS



On-site Trainings

- What does it entail?
 - Full day training
 - Overview of the project – national and state perspectives
 - Protocol for administering the survey
 - Comprehensive review of IPS survey
 - Best practices for surveyors
 - In many cases – on site meetings occur in coordination with in-person state-team meetings.



National Core Indicators

Surveyor Training Agenda

- 9:00 Welcome and introductions
- 9:20 NCI Overview
- 9:40 State Procedures (includes state specific information including mandated reporting and consent)
- 10:00 Strategies for a Successful Meeting
- 10:30 Break
- 10:45 Pre-survey and Background Information
- 11:15 Adult Consumer Survey - Section 1
- 12:00 Lunch
- 1:00 Adult Consumer Survey-Section 2
- 2:15 Break
- 2:30 Disability Etiquette
- 2:45 Group practice interviews
- 3:30 Questions and wrap up



Refresher Trainings

- Who attends refresher trainings?
 - *Returning* lead trainers and/or surveyors from previous year
- When are they held?
 - Four times throughout the year
 - By request from a state
- What does it entail?
 - National-level overview of the project
 - Reminder of survey administration protocol
 - Review of survey changes and frequently asked questions



States with New Surveyors

- What if there are new and returning?
 - New surveyors *cannot* rely on only a refresher training prior to going into the field
 - The state is responsible for providing a full face-to-face training with new surveyors
 - NCI produces materials that should be used to complete trainings



New surveyors, shadowing, and follow-up

Expectations and Best Practices

Expectations and Best Practices

- Everyone involved in NCI should have attended a full training
- Each year, the full surveying team should attend the appropriate NCI training *and* get a review/update of state specific information
- Each state should identify at least **one lead trainer**



Lead Trainers

- The lead trainer is someone who:
 - Has completed a full training and
 - Conducted the NCI survey for at least one full round of IPS data collection
- Responsibilities:
 - Ensure all surveyors take part in the applicable training
 - Conduct full face-to-face training with new surveyors as needed
 - Conduct shadow interviews and follow-up training as needed
- Provide **consistency** in trainings
- Monitoring throughout the survey year
- Often is also responsible for problem solving



Shadowing and Follow-up

- Shadowing surveyors helps ensure surveyors are following proper protocol and that everyone is conducting the survey in the same way
- Some states also complete follow-up phone calls with survey respondents to make sure that protocols were followed
- New surveyors should shadow a lead trainer or veteran surveyor before going into the field and should be shadowed at least once in the field



Training and Reliability Best Practices

- Shadow interviews are used for both training and monitoring reliability on-going.
- “Shadow”: One person interviews, another observes, both code. Follow up with areas of discrepancy, discussion, determine need for additional training.
- States also videotape on-site trainings to support training / re-training.



Emphasis on protocols

- Emphasis on ‘conversation’. Surveyors code responses.
- Maintain face to face meeting / not too many people in the room.
- Use of proxy / ensuring valid section 1 questions.



What training materials does NCI produce

Training Materials

Handbooks

- Surveyor Handbook
 - Includes: expanded definitions, information and/or rephrasing for all questions in the IPS survey (including Background Information questions)
 - Should be given to all surveyors
- Lead Trainer Guide
 - Includes: link to a video of the survey taking place; how answers should be coded and why; discussion questions
 - Used for NCI in-person trainings
 - Should be used by lead trainers to complete full training with new surveyors
 - Can also be used for in-states refreshers



Videos

- ODESA videos
 - How to enter survey data
 - Modules on administrative functions (e.g., adding users)*
- Refresher Videos*
 - Video modules for: NCI Overview, survey administration, review of Section I, review of Section II
- Best Practices
- Communication Survey
 - Questions to ask staff to find out how the person best communicates

*Coming Soon!



US!

- We are always available to talk about training interviewers, how to use materials, to answer questions that come up

