

## IV. Staffing a Community HANES

The next step is to determine how the survey will be staffed and what skills staff members will need. Before beginning to recruit or hire staff, planners will need to consider how many staff members are needed for each function, what skills are required, and how best to recruit the most qualified staff. All of these issues will be largely dependent on the study schedule and budget.

### A. Define Main Staffing Functions

The success of a community HANES depends largely on the effectiveness of the staff at accomplishing the aims of their respective jobs. To ensure smooth operations, a clear division of responsibilities and the creation of a chain of command are vital.

### B. Survey Coordination and Management

The staff charged with coordinating the different functional areas of the survey will form the survey management team. This team will drive the day-to-day operations of the survey, make decisions concerning adaptations of protocols and procedures, ensure adequate allocation of resources, and provide updates as the survey progresses. While it may be desirable to have a coordinator dedicated to each of the main study functions described below, resource limitations may require that the same person fill more than one of these functions. Functions may vary across different community HANES study models.

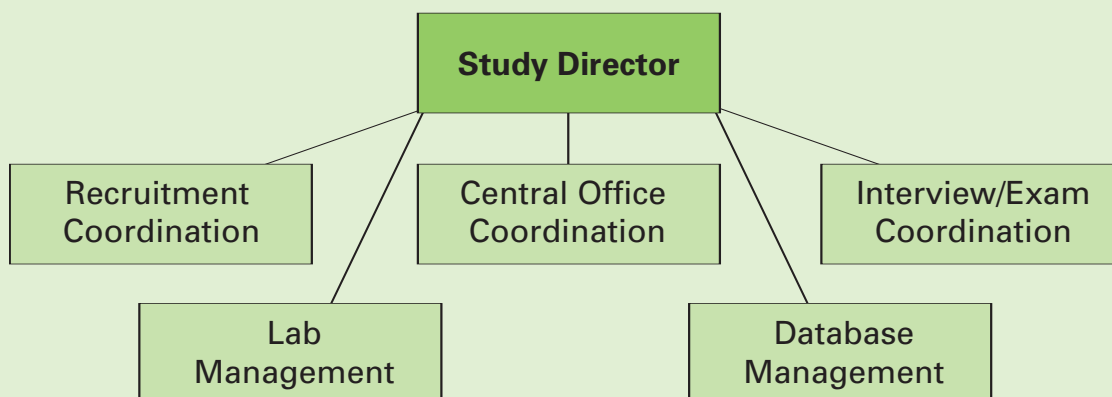
**Study Director:** Oversees the management of all areas of survey operations. The study director is intimately involved in the development of the survey protocol and the data collection methods.

**Recruitment Coordinator:** Manages all aspects of survey participant recruitment including staff scheduling, logistics, quality of recruitment data collection and outreach efforts. The recruitment coordinator will supervise how recruitment staff interact with the community and must promote professionalism at all times.

**Interview/Exam Coordinator:** Manages all aspects of the examination site operations including monitoring data quality, overseeing staff performance, and managing inventory and supply issues. Depending on the data collection model used, there may be one or several fixed site or mobile examination locations, which may involve one or more exam coordinators.

### Survey Management Functional Areas

NYC HANES encompassed the five functional areas below:



**Central Office Coordinator:** Manages and coordinates the activities of the central office. The central office coordinator should be a senior staff person capable of managing and problem solving around appointment scheduling, participant transportation, inquiries from the public, data entry, and communications from the field and clinics. The central office coordinator will need to work closely with the recruitment coordinator and the exam coordinator to ensure continuity.

**Database Manager:** Monitors and manages the data being collected from various sources. The database manager ensures the reliable functioning of data collection processes by continually monitoring the quality of the data collected. Other responsibilities may include development of data entry procedures, production of reports to monitor study progress, quality assurance checks on incoming data, review of incoming lab results, and performing data queries as needed.

**Laboratory Manager:** If blood and urine specimens are to be collected and tested, a staff person will need to oversee the entire process from collection to laboratory analysis. The laboratory manager will be involved in the development of specimen processing, shipping, and tracking procedures that satisfy the requirements of the testing protocols. This person will also act as the liaison between the site where specimens are being collected and the laboratories conducting analyses.

### C. Survey Staff

Once the coordination and management of the main functional areas of the survey have been determined, the number and types of staff required within each area should be assessed. Decisions regarding staffing the survey will depend largely on the operational model being used.

### Recruitment Staff:

Recruitment staff will have the first and most important interactions with potential survey participants. These staff members are responsible for locating and approaching selected households (if house-to-house sampling is part of the survey model), determining eligibility, and persuading selected household members to participate in the study. To be effective, recruitment staff should be well informed, resourceful, polite, persistent and persuasive. In addition to these skills, team leaders, who oversee smaller groups of recruitment staff, need good management and problem-solving skills.

### Examination/Interview Staff:

To determine the type and number of examination staff needed, study planners should carefully think through study components, the number of sites in operation and the appointment times offered. All examination staff need to be good communicators, detail-oriented and friendly. Other needed skills will depend on their specific job function.

### Central Office Staff:

Regardless of the data collection model used, the central office will likely take on clerical and customer service roles. Central office staff should have excellent clerical skills, be friendly, adaptable to change, and enjoy a fast-paced work environment. If the community to be surveyed is multilingual, having central office staff that are bi- or multilingual is highly desirable.

### D. Recruiting Staff

Having a motivated, dedicated staff will be critical to the survey's success. Once study planners know whether they will be relying on internal staff, hiring outside staff, or contracting with an outside institution, a detailed job description for each position will facilitate targeted recruitment.

## NYC HANES Staffing Needs

Based on the sample size, area and study schedule, NYC HANES organizers determined that approximately 40 full-time staff and 50 part-time staff would be needed for the four months of the study (which was later extended to six months).

Position	Full-Time Staff	Part-Time Staff (evenings and weekends)
<b>Field Operations</b>		
Field Team Leaders	3	4
Field Staff	15	20-25
<b>Clinic Operations</b>		
Clinic Coordinators	3	3
Health Technicians	12-15	12-15
Phlebotomists	3	3
Lab Assistants	3	3
<b>Central Office Operations</b>	2	5
<b>Total</b>	<b>41 - 44</b>	<b>50-58</b>

*[View: Organizational chart and staff role descriptions  
<http://www.nyc.gov/html/doh/html/hanes/section4.shtml>]*

## NYC HANES: Field/Recruitment Positions

NYC HANES had two or three recruitment teams in the field at all times during the survey operations. A **Field Team Leader** managed team logistics and answered procedural questions while teams were in the field. They also served as liaisons to the recruitment coordinator.

Field staff members, called **Field Screeners**, were grouped into borough-based teams (New York City is divided into five boroughs) and worked in pairs. These staff members were responsible for locating and approaching selected households, determining eligibility by using a household composition questionnaire and selection formula, persuading selected household members to participate in the study, and setting up exam appointments for participants by calling the central office.

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## NYC HANES: Examination Site Positions

NYC HANES components included a set of interviews, a physical examination and specimen collection which were conducted in a fixed site clinic. The various clinic positions required for the survey are described below.

**Clinic Coordinator (on-site):** Clinic coordinators managed the day-to-day operations of the clinics. Clinic coordinators were extremely responsible, adaptable and detail-oriented. Their main responsibility was to ensure that study participants move through each component of the survey process without long waits. The clinic coordinator was also responsible for welcoming and orienting all survey participants to the survey process, including explaining informed consent procedures, as well as managing clinic staff, serving as the liaison to the interview/exam coordinator, and handling any emergencies.

**Health Technicians:** The health technicians had the most sustained contact with the study participants as they collected the interview data. To ensure data quality, it was imperative that the health technicians observed standardized data collection procedures and protocols. Health technicians were friendly, detailed oriented, and proficient with specialized data collection instruments.

**Phlebotomist:** The phlebotomists managed blood and urine specimen draws, as well as processing, labeling and storage, according to study procedures. The phlebotomists' ability to thoroughly and confidently explain blood draw procedures and the importance of specimen collection were critical to ensuring a high rate of participation for this component.

**Lab Assistant:** Because NYC HANES collected both blood and urine specimens, and because the procedures required on-site processing, each clinic was staffed with a lab assistant as well as a phlebotomist. The lab assistants provided assistance to the phlebotomist in all aspects of specimen collection, processing and transport.

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## NYC HANES Staffing Model & Recruitment

Early on, NYC HANES organizers decided to rely upon existing agency staff. This decision was based on cost considerations, the presence of existing field and clinic expertise, and the desire to build capacity within the agency for large-scale survey work.

Because this meant that some full-time staff would be removed from their regular program for four months, it was critical that managers throughout the agency understood the importance of the NYC HANES project. This was accomplished via communications directly from our commissioner of health.

To target recruitment efforts within the agency, study planners determined which agency positions most closely matched the specific skills needed for various survey positions. Information sessions tailored to individuals in those jobs were held several months prior to the beginning of survey operations. In addition to information sessions, study organizers used the agency intranet to disseminate information about both full-time and part-time opportunities. Interested staff were invited to submit their resume for consideration and clearance by their supervisors.