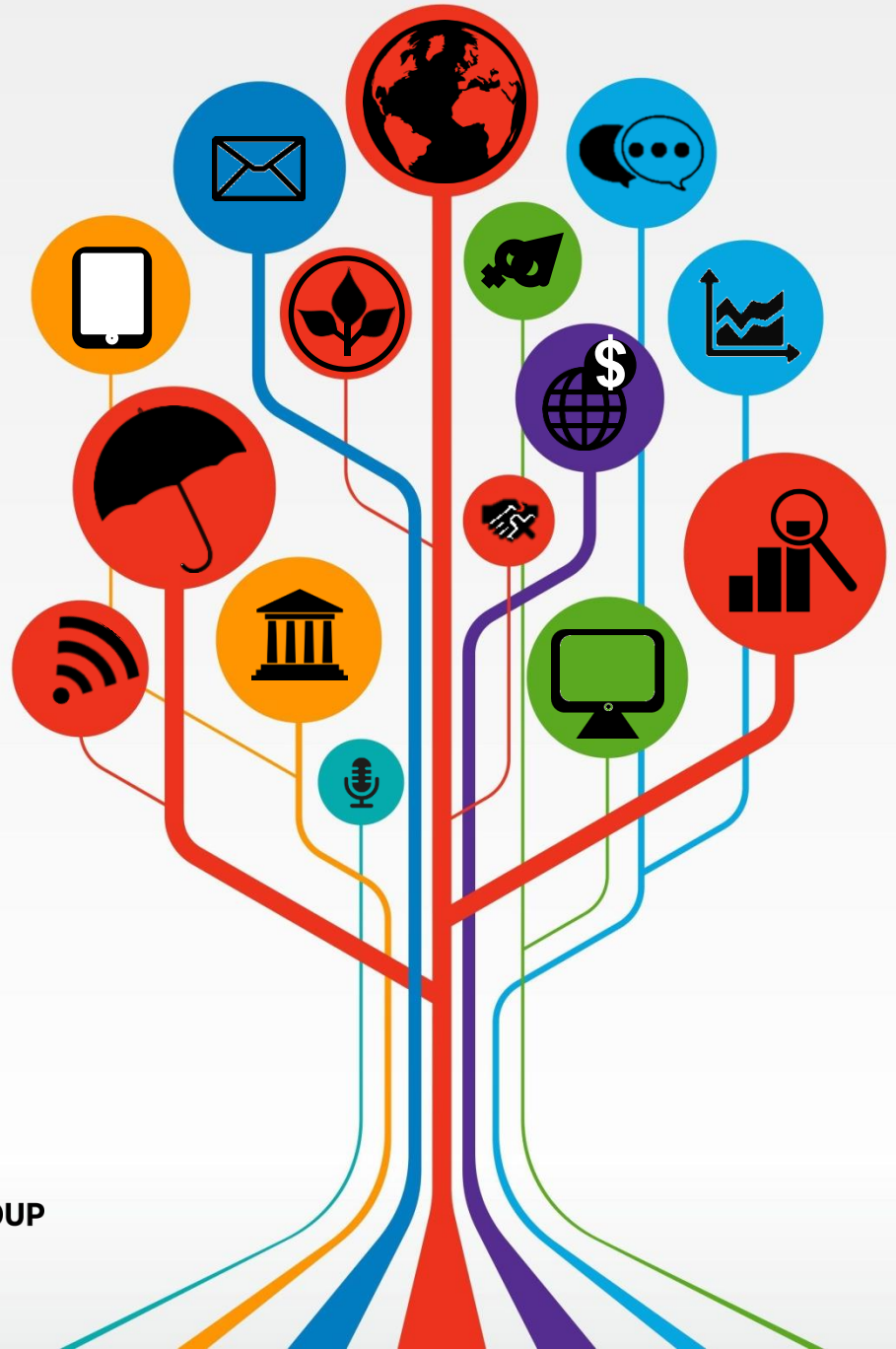


Training Data Collectors

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Phases of a household survey



Phases of a household survey



Train field staff

- Key roles
- Training objectives
- Planning the training
- Conducting the training
- Assessing enumerators
- Tips and ideas

Key roles

Survey Firm, FC, and RA key roles

- Survey firm
 - Execution of the assigned tasks
- Field coordinator
 - Ensuring constant supervision and the quality of the task delivered
- Research assistant
 - Support in the preparation of data quality assurance tools

Training objectives

Training objectives

A good training ensures that:

- All field staff are familiar with all survey protocols
- Enumerators can administer survey instrument
 - understand all questions
 - can manage tablets or paper forms
- Other field staff can perform their duties

Planning the training

Planning the training

Definition of tasks

- Complementary phase requiring continuous interactions between survey firm and FC
- Role of each part needs to be defined precisely in the terms of reference

Example of tasks definition

Planning the training

Survey firm tasks

- Coordinate logistics and provide administrative help
 - find a venue
 - prepare materials
 - tablets, pen, notebook...
 - print field manuals, questionnaires, agenda...
 - Recruit potential enumerators and skilled facilitators
- Get familiar with the IE and questionnaire contents
 - Have meetings and training with the Field Coordinator before the training

Planning the training

Field Coordinator tasks:

- ✓ Finalize the field manual
- ✓ Conduct a training of trainers and facilitators
- ✓ Prepare quizzes
- ✓ Prepare field practice with survey firm
 - Select the area, contact the project...
- ✓ Update materials

FC tasks:

Training support staff

- DIME staff (Technical oversight)
 - Train the support staff (facilitators, survey firm managers, potential supervisors) before the training on the research project, the questionnaire, and sample protocols
- Survey firm (Facilitation and support)
 - The trained staff will help during the training
- Trained staffs are not automatically supervisors or team leader!

FC tasks:

Develop Field Manual

Why develop a field manual?

- Articulate all study protocols at field level
- Provide guidelines for the survey firm
- Provide content for enumerator training
- Act as resource for enumerators in the field



FC tasks:

Develop Field Manual

A complete field manual should contain:

- Brief explanation of the study objectives
- All survey protocols
- Roles and responsibilities of field staff
- Definitions of key terms
- Instructions for using tablets
- Questionnaire
 - question conventions
 - description of questions

FC tasks:

Develop Field Manual

Field Manual : template

Part 1: Field Preparations	Part 2: Enumeration Protocol	Part 3: The Survey
<ul style="list-style-type: none">1. Introduction<ul style="list-style-type: none">1.1 Objectives of the Survey1.2 Survey2. Interviewer's Tasks<ul style="list-style-type: none">2.1 Checking the Completed Surveys2.2 Relations with the Team Leaders3. Interviewing Procedures<ul style="list-style-type: none">3.1 Team Structure3.2 Explanation of the Survey3.3 The Interview3.4 Relations with respondents3.5 Completing the Survey	<ul style="list-style-type: none">1. General Instructions for Filling out the Survey2. Questionnaire format3. Codes4. "Other" Responses5. Probing6. Skip Pattern7. Marking responses8. Other Survey Issues (translation,...)	<ul style="list-style-type: none">1. Informed Consent2. Modules3. Quality monitoring4. Use of tablets/SurveyCTO

FC tasks:

Develop Field Manual

Development Process

- Option 1
 - Field coordinator drafts manual
 - Research team reviews draft
 - Survey firm provides input and suggestions
- Option 2
 - Survey firm drafts manual
 - Field coordinator reviews and revises
 - Research team reviews if needed

Whatever the option you choose, it should be indicated in the TORs

Training Time Frame

- Depends on many factors
 - length of questionnaire
 - capacity of potential enumerators
 - complexity of study design
- Should allow for rest after sessions
- Include days for classroom and field work
- Include a day for enumerator selection and logistics
- Use the field manual as a guide
- Survey firms will push for less time spent in training. **You will never need less time in training!**

Conducting the training

Conducting the training

A complementary approach for a comprehensive training

Survey firm leads the training

Explain survey & interview protocols

Help to explain questions

Enumerator selection

Field Coordinator supervises/monitor

Ensure the questionnaire and protocols are adequately explained and understood

Participate in training sessions & practices

Enumerators selection

Field Protocols Vocabulary (Day 1)

Survey and sample explanation - FC

Procedures and set of instruction referring to a particular survey for a particular project and its sample

- ☐ What is the survey about? What method(s)?
- ☐ Where and when is the data collection?
- ☐ Overview of sample, respondent selection and replacement procedures

Field Protocols Vocabulary (Day 1)

Interview Protocols - Survey Firm

Procedures and instructions related to interview protocols and interacting with respondents

- ☐ Confidentiality and consent
 - Ensure to spend a significant time on consent!
 - Anticipate and discuss clarification questions the respondents may have
- ☐ Cooperation techniques and tracking
 - Define roles and procedures in case of reluctance
- ☐ Data quality protocols
- ☐ Neutrality

Survey content (Day 2-3)

Objective:

- ☐ Understand structure of the survey
- ☐ Get familiar with the content of the questionnaire module by module
- ☐ Ensure appropriate mastering of the paper version
 - To understand the survey logic with an overview of the questions (loops, skips, etc.)
 - To learn how to fill the paper version in case the tablet/programming can't be used
- ☐ Anticipate potential challenges

Survey content (Day 2-3)

Example of potential challenge:

- ☐ Some questions may be interpreted differently by each respondent

Solution:

- ☐ Be aware of local understanding of some type of ideas
- ☐ Make sure to formulate the question in the most straightforward and clear way possible
- ☐ Ensure to explain to enumerators tricks to assess respondents comprehension
- ☐ Anticipate techniques to push questions further when comprehension is doubtful

Survey content (Day 2-3)

Example of doubtful comprehension

- Question: How many bags of rice did you use to pay transporter?

Objective of researcher: Obtain all payments done in nature and record sales on a separate question

Context of intervention:

- Transporters are paid on the plot
- Farmers tend to sell rice on the plot and pay cash to transporter
- Problem: majority of farmers do not consider this operation as a sale but as a payment in nature

What would you do to ensure understanding?

Translations (Day 4)

Objective:

- ☐ Discuss version in local languages
- ☐ Double-check understanding of underlying message behind each question
- ☐ Ensure agreement on all translation proposed
- ☐ Take notes on potential improvements on the translation
- ☐ Role games in the local language

CAPI (Day 5-6)

Objective:

- ☐ Familiarize with the electronic version of the questionnaire
- ☐ Allow to practice and assimilate questions type and skip patterns
- ☐ Allow to detect some potential bugs in the questionnaire
 - Ensure to test extensively before the training to avoid not having the chance to practice some questions due to programming issues!

Assessment and Q&A (Day 7)

Objective:

- ☐ Check understanding and assess comfort with the instruments
- ☐ Ensure to correct together and allow enough time to clarify all the potential doubtful points
- ☐ Encourage exchanges and questions all along the training

Field pilot (Day 8-9)

Objective:

- ☐ Better understand the sense of the questionnaire with respect to the context
- ☐ Practice and master the questionnaire
- ☐ Clarify some potential misunderstanding
- ☐ Monitoring and assessing further practical skills of enumerators
- ☐ Make sure enumerators are good listeners

Feedback session (Day 10)

Objective:

- ☐ Clarify all remaining points
- ☐ Get feedbacks on some realities of the field not accounted for
- ☐ Ensure that the survey teams are ready and, when not, plan some additional time for adjusting in case of serious misalignments

FC tasks: Questionnaire updates

- Throughout training, mistakes may be found in questions, programming, or the field manual
- Take notes each day on necessary changes
- Update questionnaires daily if possible
- Print updated Field Manual at end of training

Classroom tips

- Include large and small group sessions
- Ensure participants practice all survey components
 - introductions, consent, administering questions
- Practice. Every. Single. Question.
- Allow for anonymous questions
- Give enough breaks, but assign homework
- Enforce discipline (No mobile phone, frequent movement in and out)!
- Have session(s) with your counterparts for
 - an explanation of the project,
 - technical terms and translation support

Assessing Enumerators

Enumerators selection

When?

- First day: be as transparent as possible regarding the selection process
- All days: observes, take notes and test..
- Last day: make selection

Who?

The selection process should include:

- the survey firm management team,
- supervisors/facilitators if applicable
- YOU!

How many?

Train more enumerators than necessary!

- motivates better performance in training
- ensures qualified replacements are available

How?

Evaluation criterias related to :

- Participant survey skills
- Logistic criteria (local language...)

Evaluation criteria

- Scores at the quizzes
- Test using CAPI when feasible
- Observations during field practice
- Participation and punctuality
- Interpersonal skills and ability to work as a team...
- Previous experience(s) as data collectors

Quizzes

Be Creative!

Assess the level of understanding of:

- Training material (definitions of key terms, field procedures, etc.)
- Reading comprehension in relevant languages
- Understanding of key questions
- Numeracy skills!
- All type of questions to test

Be Reactive!

- Create your quiz before the training
- Edit your quizzes based on your observations
- Correct the quiz quickly to share results quickly

Be Reassuring!

- The tests assess progression, not performances
- The tests are not the only evaluation criteria
- A way for you and the survey firm to re-orient the training sessions

	Template from adherence form survey
1	<p>What are the rice varieties eligible for the pilot ?</p> <ul style="list-style-type: none"> - A : Brisé Sahel 108 - B : paddy Sahel 108 - C : paddy Sahel 130 - D : paddy Sahel 134
2	<p>Cite the three main aspects of the WRS project</p> <p>1.....</p> <p>2.....</p> <p>3.....</p>
3	<p>When taking part to the program, access to credit from CNCAS is granted immediately and with no time limit.</p> <ul style="list-style-type: none"> - 1. True 2. False
4	<p>Amy has harvested 100 bags of Sahel 201, 200 bags of Sahel 177 and 5 bags of Sahel 134. Is she eligible to take part to the pilot ? If yes, how many bags will she be allowed to deposit in the warehouse?</p> <p>R :</p>
5	<p>Pilot participants will be exempted from storage fees until the end of the project.</p> <ul style="list-style-type: none"> - 1. True 2. False
6	<p>Oumy is a farmer in Savoigne. The PO to which she belongs, harvests 15ha. She has a plot of 0.9 ha within the PO and 10ha in the private domain. She harvested all her plots. What are you going to reply to the following questions?</p> <ul style="list-style-type: none"> - Q24 : How many hectares did you harvest individually in the public domain during the dry season 2018 ? <p>R :</p> <ul style="list-style-type: none"> - Q25 : How many hectares did you harvest individually in the private domain during the dry season 2018? ? <p>R :</p>
7	<p>The final participants will be selected through a transparent randomization process that will be led by the producer organizations.</p> <ul style="list-style-type: none"> - 1. True 2. False
8	<p>Fatou reported that she harvested a plot of 5 ha and got 200 bags of 80 kg paddy. She reports that, in a normal situation, she shall have obtained 500 bags of 8- kg. What are you going to reply to the following question: Q39 : In the last 12 mois, did you face any post-harvest loss?</p> <p>A. No post-harvest loss</p> <p>B. Yes, small amount</p> <p>C. Yes, big amount</p>
9	<p>Treatment farmers will be allowed to deposit the rice issued from the harvest of the rainy season 2017-2018.</p> <ul style="list-style-type: none"> - 1. True 2. False
10	<p>Modou said that he would be interested in participating in the pilot. However, when you read to him the consent form, he says that if after randomization, he will not be in the treatment group, he won't be willing to collaborate to the study anymore. What are you going to do ?</p> <p>R :</p>

Template from endline survey

- 1 What would you do in case of refusal to pursue the survey till the end of a respondent ?
- 2 Who shall be interviewed for the survey? Which is the protocol to be followed in case of doubts on the identity of the person to be interviewed?
- 3 Please specify the steps to be followed if the identification information appearing in the tablet do not correspond to the ones the respondent is giving you.
- 4 Define the idea of «noyau »
- 5 What is the global period of reference of the survey ?
- 6 Please define the idea of pressure in the context of this survey.
- 7 In which type of question you will need to show the « show cards » to respondents?
- 8 Please indicate one of the key criteria to assess if the person you are interviewing knows the WRS project
- 9 Please indicate two of the key criteria to assess if the person knows the WRS pilot implemented in the valley.
- 10 What is the difference between the lottery 1 and 2 of the final section ?

Field Practices observations

Observation checklist

- Complete Equipment (pen, notebook,...)
- Selecting the right respondent
- Introduction to the respondent, consent
- Introductory sentences and reading the questions correctly
- Probing
- Familiarity with the survey and confidence
- Language proficiency
- Interactions with the respondent (verbally and non-verbally)
- Objectivity, patience, attention to details, creating a conducive environment (privacy) ...

Evaluation of Participation

- Punctuality
- General understanding of the questionnaire
- Active participation
- Initiative
- Integrity, attitude and team work
- Communication skills
- Device literacy
- Local language proficiency

5 = Excellent

4 = Strong

3 = Average

2 = Weak

1 = Poor

Tips and ideas

Tips and Ideas

- Take regular notes
- Think logistics : print quizzes, upload forms
- Take a picture of the candidates if they agree
- Deliver a participation certificate and recommend your enumerators
- Plan one refreshing day to remind the team about survey procedures, staff organization, changes in the questionnaires, give per-diems and explain logistics (accommodation & transports, ...) etc.

Additional tips

- ☐ The more piloting you do ex-ante, the smoother things will be during the training
- ☐ However, not everything can be anticipated
- ☐ Value enumerators feedbacks and when possible improve your instrument with their tips
- ☐ Don't make crucial change in your instrument after the training, enumerators will more likely remember the version explained during the training and reproduce it even after the change

Thank you for your attention!

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