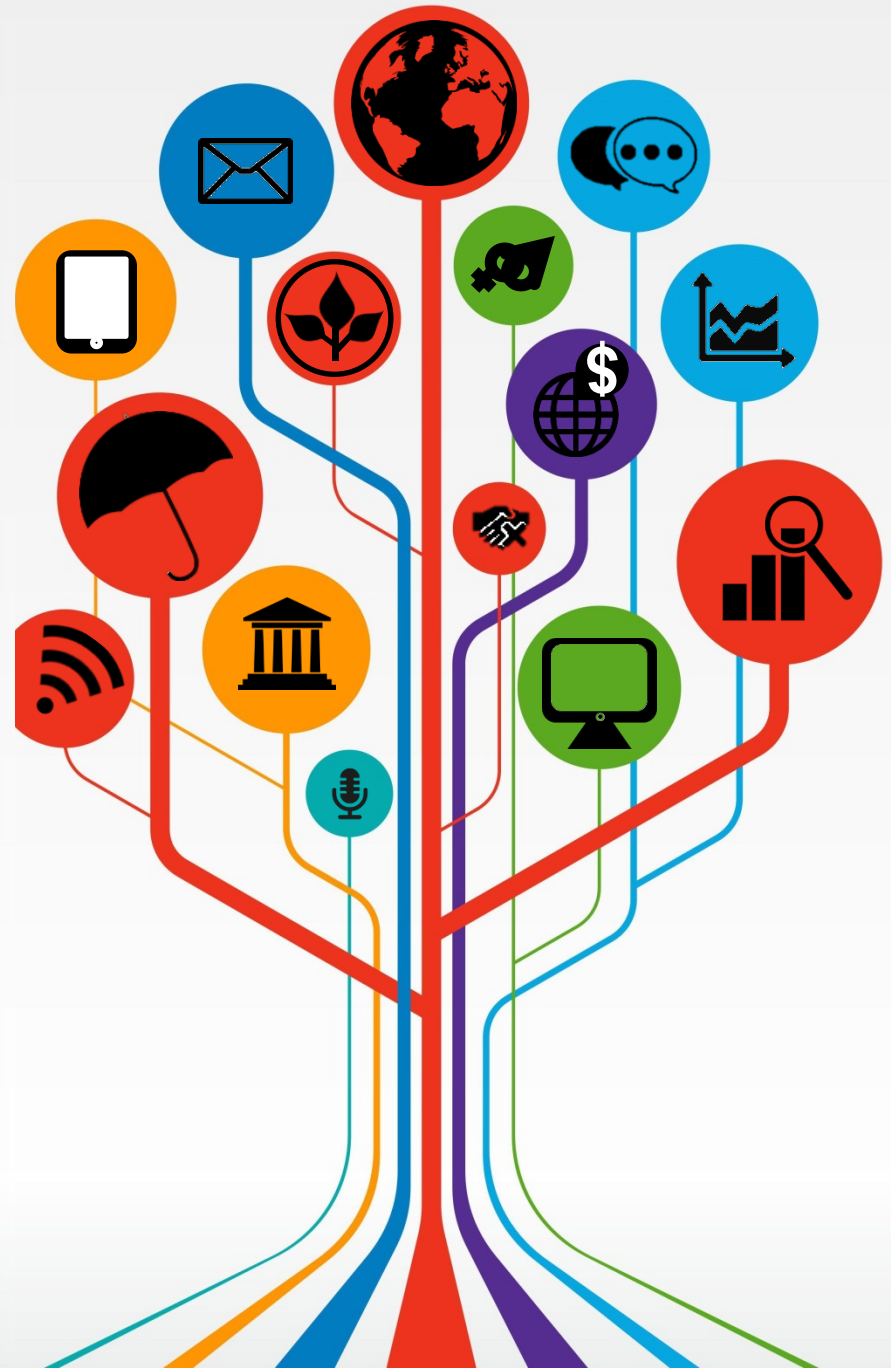


# FIELD COORDINATOR WORKSHOP

## Manage Successful Impact Evaluations

18 - 22 JUNE 2018  
WASHINGTON, DC

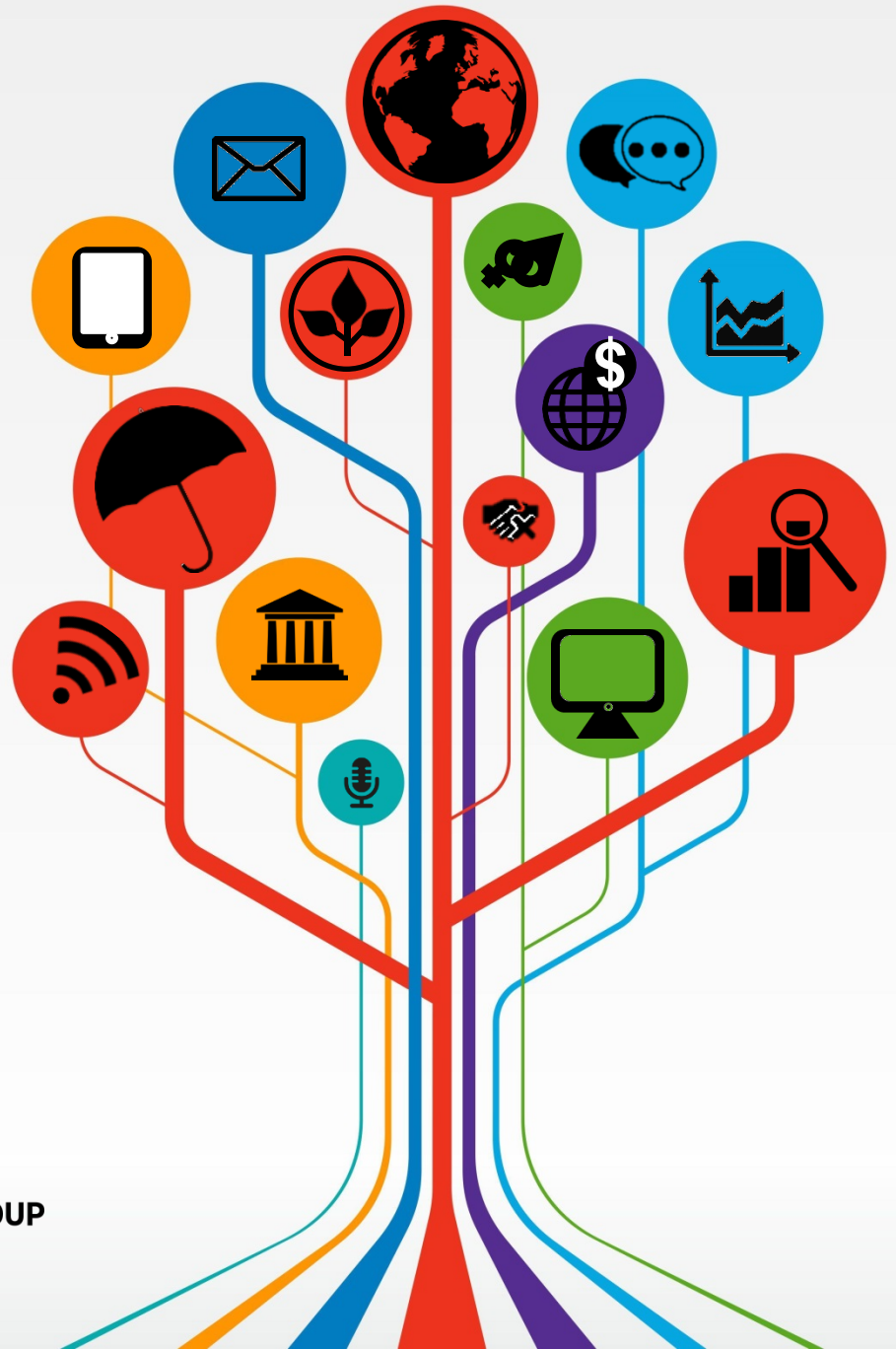


# Training Data Collectors

Aurelie Rigaud

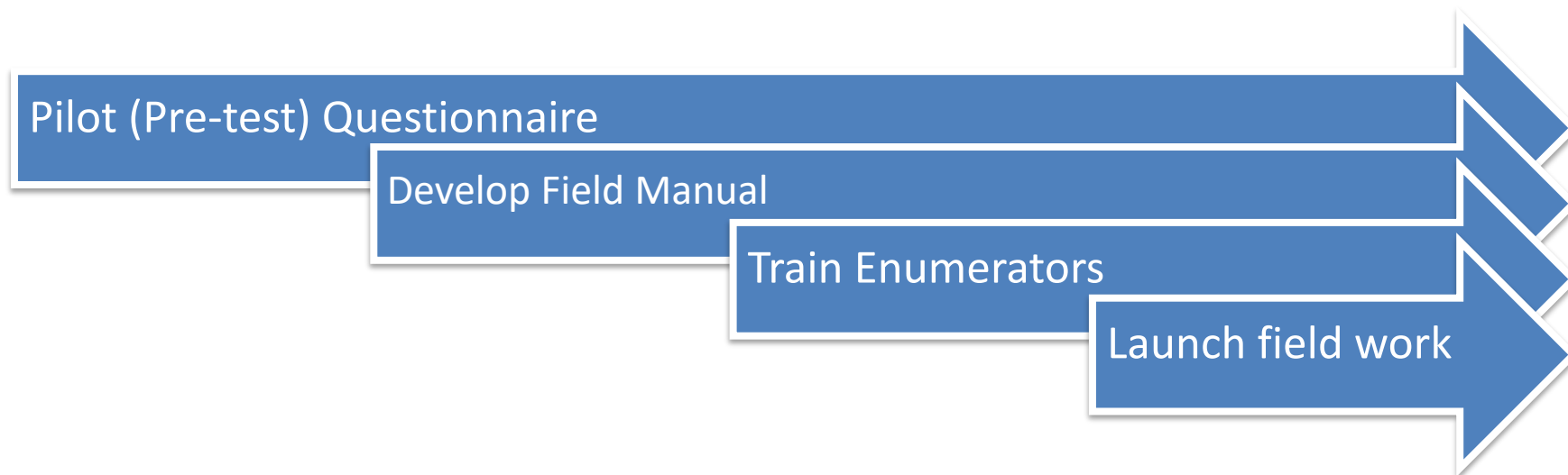
Christophe Ndahimana

18 June 2018



# Phases of a household survey

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# Planning and Preparing Household Surveys

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## Train Field Staff



# Train Field Staff

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## Content

- Training Objectives
- Planning the training
- Conducting the training
- Assessing enumerators
- Tips and ideas

*Survey Firm & Field Coordinator tasks*

# Training Objectives

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## **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

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# Planning the training

# Planning the training

## *Survey firm tasks*

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- Coordinate logistics and provide administrative help
  - find a venue
  - prepare materials
    - tablets, pen, notebook...
    - print field manuals, questionnaires and 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:***

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- ✓ 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

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- DIME Staff (Technical Oversight)
  - Train the support staff (facilitators, survey firm managers, potential supervisors) before the training to 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

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## **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

## A Field Manual template:

Part 1: Field Preparations	Part 2: Enumeration Protocol	Part 3: The Survey
<ul style="list-style-type: none"><li>1. Introduction<ul style="list-style-type: none"><li>1.1 Objectives of the Survey</li><li>1.2 Survey</li></ul></li><li>2. Interviewer's Tasks<ul style="list-style-type: none"><li>2.1 Checking the Completed Surveys</li><li>2.2 Relations with the Team Leaders</li></ul></li><li>3. Interviewing Procedures<ul style="list-style-type: none"><li>3.1 Team Structure</li><li>3.2 Explanation of the Survey</li><li>3.3 The Interview</li><li>3.4 Completing the Survey</li></ul></li></ul>	<ul style="list-style-type: none"><li>1. General Instructions for Filling out the Survey</li><li>2. Questionnaire format</li><li>3. Codes</li><li>4. "Other" Responses</li><li>5. Probing</li><li>6. Skip Pattern</li><li>7. Marking responses</li><li>8. Other Survey Issues (translation,...)</li></ul>	<ul style="list-style-type: none"><li>1. Informed Consent</li><li>2. Modules</li><li>3. Quality monitoring</li><li>4. Use of tablets/SurveyCTO</li></ul>

## 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 you choose, it should be indicated in the TORs*

# Training Time Frame

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- Dependent on many issues
  - 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!**

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# Conducting the training



# Conducting the training

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## 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)

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## Survey and sample explanation

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 Coordinator**

Procedures and instructions related to interview protocols and interacting with respondents

- Confidentiality and consent
- Cooperation techniques and tracking
- Data quality protocols
- Neutrality

**Survey Firm**

## Interview Protocols

# Day 1

Time	Item & Activity	Details	Trainer
Morning	Introduction	Training presentation: rules, agenda Presentation of the participants	Survey Firm
Morning	Project presentation	Project presentation and research questions	Field Coordinator
Break			
Morning	Interview protocol	Respondent consent, confidentiality, data security, neutrality, cooperation techniques	Survey Firm
Morning	Survey protocols	Overview of sample, respondent selection & replacement	Field Coordinator/ Survey Firm
Lunch break			
Afternoon	Questionnaire review	Survey content (paper version)	Field Coordinator
Break			
Afternoon	Questionnaire review	Survey content (paper version)	Field Coordinator
Afternoon	Wrap Up	Review day's activities Discuss plans for the next day, Questions	All

# Day 1

## Survey content – Paper questionnaire

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- Explanation of the survey content on paper questionnaire before practicing on the tablet:
  - To understand the survey logic with an overview of the questions (loops, skips, etc. )
  - Enumerators learn how to fill the paper version in case the tablet/programming can't be used

# Day 2

Time	Item & Activity	Details	Trainer
Morning	Quiz 1	Test 1 for all participants	All
Morning	Questionnaire	Survey content (paper version)	Field Coordinator
Break			
Morning	Questionnaire	Survey content (paper version)	Field Coordinator
Morning	Project presentation	Presentation of the project & technical terms	Project team
Lunch break			
Afternoon	Role play	Practice on paper version	All
Break			
Afternoon	Role play	Practice on paper version	All
Afternoon	Wrap Up	Review day's activities Discuss plans for the next day, Questions	All

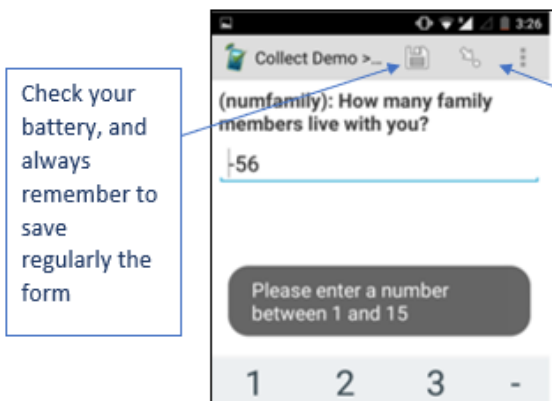
# Day 3

Time	Item & Activity	Details	Trainer
Morning	Quiz 2	Test 2 for all participants	All
Morning	Questionnaire translation (1/3)	Translation of key words by groups	All + project staff
Break			
Morning	Introduction to SurveyCTO	Presentation of the CAPI Navigation on the tablet	FC as respondent
Lunch break			
Afternoon	Practice on device (1/4)	Role play on electronic questionnaire	FC as respondent
Break			
Afternoon	Practice on device (2/4)	Role play on electronic questionnaire	FC as respondent
Afternoon	Wrap Up	Review day's activities Discuss plans for the next day, Questions	All

# FC tasks:

## Presentation of SurveyCTO (Day 2-3)

- SurveyCTO user guide: go through all the important steps using SurveyCTO and the device for the data collection.



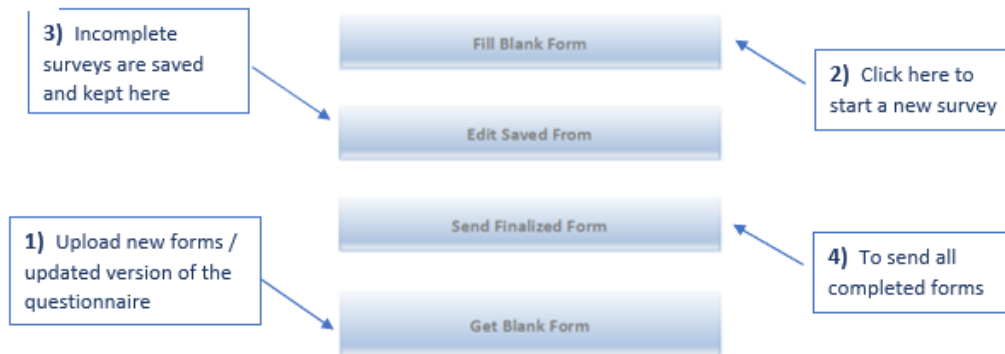
Check your battery, and always remember to save regularly the form

Click here to display the prompting menu

- How do I save and edit a form?*
- Should I mark the form as finalized after completing an interview?*
- How to send a form? ...*

- Given to enumerators during the training

Presentation of the Menu window



# Day 4

Time	Item & Activity	Details	Trainer
Morning	Quiz 3	Test 3 (optional )	All
Morning	Questionnaire translation (2/3)	Translation of key words by groups	All
Break			
Morning	Practice on device (3/4)	Role play on electronic questionnaire	Field coordinator
Lunch break			
Afternoon	Questionnaire translation (3/3)	Translation of key words by groups	FC as respondent
Break			
Afternoon	Practice on device (4/4)	Role play on electronic questionnaire	FC as respondent
Afternoon	Wrap Up	Review day's activities Discuss plans for the next day, Questions	All



# Day 5

Time	Item & Activity	Details	Trainer
Day	Field practice in pilot area	Interviews' practice for each enumerator Monitoring and observation	all
End of the day	Feedback session	Review day's activities: Feedback & comments on challenges and success	all

## FC tasks:

## Questionnaire updates

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- 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

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- 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

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# 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

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- 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

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## 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

# Quiz 1 template (1/2)

• **NAME:** \_\_\_\_\_

<b>Have you already worked on a survey?</b>	1 yes      0 No	<b>For what institution/ NGO/ Surveyfirm:</b>
<b>What was your position? [circle the figure]</b>	1 Surveyor 2 Team leader/supervisor	3 Field supervisor 4 Backchecker/ Auditors 5 Other, specify:

<b>What does SLWMP stand?</b>	<b>Why do we collect the data? (Objective of the survey)</b>
<b>How would you introduce yourself on the phone to schedule an interview or the first time you meet a respondent?</b>	<b>Write 3 important things to mention by convincing the respondent to participate to the survey?</b>
<b>Explain what this surveyor guideline means: 'Remain neutral'</b>	

Circle the right information:

<b>a/ Number of PES communities surveyed</b> 8      10      12	<b>b/ Number of communities surveyed for the baseline:</b> 65      70      75	<b>c/ PES means:</b> a/ Policy Ecological services b/ Payment for Environmental services c/ Practices for Ecological sustainability
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# Quiz 1 template (2/2)

- Household Roster: Here is a farmers story, fill the Household Roster table, (when possible, leave it blank when necessary)

*My name is Iddrissu, I am a 42 years old farmer that harvests maize and soyabean. When my yield is important, I can sell the crops at the local market. This our business, I earn 200 cedis per weeks. Rosemary my wife is 42 and works in a small beauty shop in the community and she is paid on the counter when the business is good. Her SSNIT is not paid... Last time she received 64 GHS. My son Isaac lives in Bolgatanga since 2 years for his master studies. He comes back home only for holidays. He will turn 22 in April 2017. My brother Kwame lives with us but only since December 2016. He is looking for an accommodation in the community and works with me at the farm from time to time. My daughter Stephany is 8 years old, she goes to the school of the community*

B1	B1_2	B2	B3	B4	B5	B6	B7	B8
ID	Full name of the person	What is this person's relation to the household head	Gender 1 Male 2 Female	What is {person}'s age?	Is {person} currently going to school? 1 Yes 0 No  If B4<18 -> Next HH member	Is this person employed in any paid labor for which he/she receive a wage, not including jobs with family? 1 Yes 0 No if 0-> Next HH member	Is it a formal employment status? 1 yes 0 No	The last time this person was paid, how much did he/she receive? in Cedis
1								
2								
3								
4								
5								

# Field Practices observations

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## 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

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- 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

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- 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 re training day to remind the team about survey procedures, staff organization, changes in the questionnaires, give per-diems and explain logistics (accommodation & transports, ...) etc.

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Thank you for your attention!

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