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| Institute for International Programs – Johns Hopkins University |
| **RADAR Coverage Survey Training Activities and Evaluation** |
| *Version [#], [DATE]* |

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**TRAINING ACTIVITIES**

Training facilitation should be carried using various forms of instruction, including traditional classroom teaching sessions, small and large group discussions, and small and large group activities, such as scenarios and role plays. Integrating different learning methods will allow for the synthesis of training materials in an interactive and engaging way and appeals to various learning styles. Below, you will find a list of suggested activities that you can adapt and integrate throughout your training activities.

**Activity 1: Full classroom interview**

One way of introducing the questionnaires and modules within the Coverage Survey is to start by reading the individual questions of the survey aloud as a group in a classroom setting. As the facilitator of this session, you will act as the eligible respondent for the survey and each trainee will act as an interviewer in the classroom, by taking turns asking you the individual questions found in the survey. As the facilitator responds to the questions asked, all trainees may enter the responses directly on a paper survey or using their tablets, depending on your preferred method of training (i.e. training first on paper, then moving to CAPI or only using CAPI in training).

The advantage of having interviewers enter the information directly into the tablet is that you can have them submit the data to the server and will be able to identify if all of the trainees are entering the correct responses. If there are certain questions or sections of the questionnaire that are consistently being recorded incorrectly, this is a good opportunity to note these issues down and address them directly later on another training day, in order to review common errors and clarify the correct responses.

To start this activity you will need to first provide the interviewers with administrative details about the cluster, interviewer code, supervisor code and other details such as the dwelling and/or household number. Once they have all entered these details, they can start by taking turns asking the questions as a mock interview with the facilitator as the respondent. As the Coverage Survey is modular in nature, this activity can have modules or entire questionnaires split into sections over the course of training or can be done as a full survey, starting with the Household Listing module.

Although this sounds like a lengthy activity, it allows the training facilitator to stop and review the purpose of the question and language or translation considerations for each question. It also allows for the open discussion about interview techniques, probing, and how to correctly enter the responses, as a group. It is also a great opportunity as facilitator to pause the interview and bring the entire team back to read from their manuals directly for clarification and/or more training on specific topics, as needed.

**Activity 2: Partnered interviews**

In groups of two, have trainees take turns acting as the interviewer and respondent for either the full survey, individual questionnaires, or individual modules. Once one person has acted as the interviewer, they should switch roles so they both get to experience interviewing and being interviewed. The trainees may choose to be creative to think of a scenario ahead of time if they would like to avoid revealing too many private or sensitive details about themselves to their peers.

**Activity 3: Self or at home interviews**

Although interviewers should not be allowed to take their tablets with them at the end of a training day, they may be given several paper copies of the questionnaire for at-home practice.

A good homework activity after the first introduction day of training is to have the interviewer fill in a full questionnaire by asking themselves the questions and filling in the responses based on their current household structure. This will allow them to take their time and think about the questions and how they would respond if they were the respondent. If the interviewee is able to find a willing family member or friend, they could also practice interviewing techniques outside of the training classroom with those that are comfortable and willingly provide informal consent to acting as a respondent. Although informal, the responses provided in this type of scenario from the individual trainee, family member, or friend should remain confidential and not shared outside of the scope of the interview. Having these additional interviewers prior to receiving the full training will allow the trainee to better appreciate the interview questions and techniques from the perspective of the respondent.

**Activity 4: The field pilot**

After you have finished training interviewers on how to conduct the full coverage survey interview, 1 - 2 full days of field practice should take place in a location that is representative of the type of communities you will work in (i.e. rural) but at the same time, are not and will not be part of your project’s implementation. Thus, finding a few clusters that are near the training venue but are from another region or district where your project is not working would be the best approach.

Interviewers may be assigned households individually or put into pairs to take turns interviewing household members during the field pilot. If you have been monitoring interviewer performance throughout training, a suggestion would be to pair one “stronger” and one “weaker” interviewer together. This will allow the interviewers to work together to implement the correct survey methodology and problem solve in case any issues arise during the interviews. After the field pilot day(s), there should be enough time dedicated within the allocated training time to allow each interviewer or pair of interviewers time to debrief on any field related challenges (i.e. locating or defining households) or areas that require further training or improvement within the survey (i.e. translations, probing techniques, skip / logic checks).

**Activity 5: Scenarios**

Throughout training, you may want to integrate some ‘real world’ example scenarios into your instructional sessions. Good scenarios are situations that are likely to arise during an interview and will require critical thinking on behalf of the interviewers to know how to correctly proceed. Review of these types of scenarios during training will reduce the number of challenges related to these issues as interviewers will know how to properly address the issue during an interview. As the facilitator, you may better understand the context of the area you will be working in and have scenarios from prior experiences that you can develop and bring up as you move through the material. Below are some example scenarios that you can include during training, or make adaptations to base on your program and context. Scenarios can be either read aloud to the full classroom for open discussion, assigned as individual homework for submission / grading, or done as a small group activity. Regardless of the method of implementing the scenarios, a discussion and correct response should be reviewed as a full classroom in order to ensure all interviewers understand the correct procedure.

Example Scenario 1:

You are visiting a household and have completed the Household Questionnaire. In the Household Listing module you noted that there are three women present in this household:

1. Caroline is 19 years old and has no children under the age of 5

2. Mercy is 25 years old and has two children under the age of 5, a boy named Emmanuel (2 years old) and a girl named Mary (4 years old)

3. Eloise is 55 years old and is the mother both of Caroline and Mercy.

All three women are interested and willing to complete the Women’s Questionnaire. It is nearing the end of the day, and you are feeling rushed and tired.

How many of the women are eligible to complete the Woman’s Questionnaire in this household?

How many children are eligible to complete the Children’s Questionnaire and anthropometry (weigh and measure)?

If any of the women who are not eligible remain very persistent that they would like to be interviewed, what would you do?

*ANSWER: Interview the women who are 19 and 25 years old and complete questionnaires for the two children under the age of 5. The women who is 55 years old is not eligible for the women’s questionnaire. In a respectful manner, explain to her the purpose of the study and eligibility criteria for completing the women’s questionnaire. All eligible women aged 15-49 years old and children under age 5 who are residents of the household must be interviewed (if willing to provide consent).*

Example Scenario 2:

You reach a household and meet a husband and wife. You explain the purpose of the project and the survey, but the husband does not want to participate. The woman expresses interest and willingness to participate, but the husband speaks over her and tells her to go into the other room.

What would you do?

*ANSWER: Ask both the husband and the wife if there is a better time when you could return. Offer to do a call back at a later date. Do not force the interview and do not put the wife in an awkward position. If the husband expresses agitation or does not wish you to return to the household, code the survey as a refusal.*

Example Scenario 3*:*

You are in cluster with your research team, consisting of other research assistants and your research supervisor / team leader. You are walking from household to household to conduct the interviews that were assigned for you to complete. You pass a household that was assigned to a different research assistant on your team, and notice that there are people home even though you know that this research assistant coded the survey as “household absent for an extended period”.

What do you do?

*ANSWER: If you feel comfortable, you could approach the colleague to discuss your finding. It is possible that when the other research assistant was at this household, there really was no one at home at the time and perhaps a neighbor had miscommunicated information on their whereabouts / when they would return to the household. In this situation, you could notify your colleague that you have found the household at home and they are available to be interviewed. If you don’t feel comfortable speaking with your colleague directly, you could take note of the household location and bring it to the attention of the supervisor who should to discuss with the research assistant later.*

Example Scenario 4:

You arrive at your first household for the day and begin by introducing yourself and explain the purpose of the project and the survey. The participant says they are willing to complete the interview, but only if you pay them money for their time. The participant seems to be drunk and agitated by your presence and is “tired of being asked questions without ever seeing improvements”.

*ANSWER: Tell the respondent that there are no direct benefits to participating in the survey and that you cannot provide them with any compensation / money. Explain the purpose of the study and survey again, stating that even though there are no direct benefits to participation, that the data obtained from the survey will be used to plan, implement, and evaluate interventions that may have benefits to the community at a later date. You can explain that although his household may not observe the benefits directly because the interventions are at the community level and depend on individual utilization of services, but that improvements within the health facility and community as a whole may benefit him at some point and time. Ask again if they are willing to participate. If yes, continue with the interview. If the respondent is still unwilling to participate without monetary compensation and becomes more agitated, respectfully close the discussion, leave the household, and code the survey as a refusal. If you feel that you need help explaining in more details to this respondent, you could also call your supervisor / team leader to come and provide further clarification to the respondents, particularly at another point and time when the respondent is no longer drunk..*

Example Scenario 5:

You are a research assistant in a household who has finished the Household Questionnaire and are almost finished interviewing the daughter of the household head, Claire who is 16 years old. When you are asking the questions related to family planning, Claire asks you about your recommendations for contraceptive methods. She asks you several questions about avoiding pregnancy, all of which are based on myths she has learned from her friends or family.

What do you do?

How would you ensure privacy and confidentiality in this situation?

*ANSWER: Explain to her that you are not a health professional and you are unable to give her any advice on contraception. Encourage her to speak to her CHW or to visit a Health Facility so that she can get her questions answered by a health care professional. Do not give her medical advice. Do not break confidentiality by informing other household members that she has questions. Call your supervisor / team leader for advice, if you are unsure of how to proceed in this situation.*

Example Scenario 6:

You have conducted the Household Questionnaire and identified an eligible woman for the Woman’s Questionnaire named Shakira. According to the Household Listing module, Shakira has 3 eligible children, Abel aged 6 months, Sasha aged 1 year and Kenneth is 4 years old. However, when you start the Fertility Module of the Woman’s Questionnaire, she tells you that her most recent birth with Abel was 4 months ago. What do you do?

*ANSWER: Ask for the birthday again and probe further. For eligibility for the Under 5 child’s questionnaire, the child needs to be <5 years (0-4 years) and for some questions needs to be <2 years (0-23 months). It is important that the ages are correct. Probe mother for time of year (rainy, dry seasons) or significant events that happened around the time of birth (i.e. elections, community event, etc.) to help obtain a more accurate month / year. For year of birth, use the age chart or calculation methods to determine the age. Do not change the date of birth in the Household Questionnaire. Record the corrected date of birth in the Fertility Module. The birth date and ages of her eligible children will be verified and corrected in the Children’s questionnaire.*

Example Scenario 7:

A team of research assistants and a research supervisor / team leader have arrived in a cluster and have divided up the households for interviewing. You are a research assistant on this team and reach your first household to discover that one of the household members is a friend of yours from secondary school.

What do you do?

*ANSWER: Report to your supervisor to get the household re-assigned to a different interviewer. You should not interview people you know.*

Example Scenario 8 (for surveys conducing the Anthropometry Module):

When measuring height and weight for a child in a household you suspect that they are malnourished (very low weight for their age/height).

What do you do?

*ANSWER: Recommend that they visit a nearby health facility. Inform your supervisor / team leader. The supervisor / team leader can follow any policy that may be in place for referral of identified sick children in the research communities, such as notifying a CHW and/or nearest health facility to make them aware that this child may need medical attention. A local leader may be approached to see if there are any community funds for transportation to the facility. If the child is very sick, talk to your supervisor*

**Activity 6: Role Plays**

Another way to get interviewers comfortable with the interview process is to have role plays with instructions that guide the trainee through a specific scenario that they must act out in front of the full classroom or in a small group. If you conduct the role plays in a large group, it would be beneficial to have all of the trainees listen carefully and follow along with the interview by entering the responses given by the respondent directly into the paper questionnaire or tablet; they should not interrupt the interview until after when there is time allotted to ask questions and have a group discussion. The training facilitator may have the interviewers submit data entered on the tablet and review the responses afterwards to ensure everyone filled in the correct information.

Example Role Play 1 (2 volunteers):

Participant 1 is conducting an interview with an eligible woman, Jessica (Participant 2) who is 17 years old.

Start asking the questions at the Family Planning module in the tablet application. As you move through these questions, Participant 2 gets more and more visibly upset / uncomfortable talking about the sexual activity because she is an unmarried, young woman. She is shy and worried that others in the household may hear her responses.

Participant 1: You are interviewing Jessica. Read the questions from the questionnaire. Respond and probe appropriately to the reactions by Participant 2 during the interview.

Participant 2: You are visibly uncomfortable and hesitant to answer questions about sexual activity. You respond to these questions by telling the interviewer that you are an unmarried woman, without answering the question directly. If the interviewer probes further, note that you are worried that you are concerned about privacy and the possibility that your parents may overhear your conversations.

Example Role Play 2 (2 volunteers):

Participant 1: You are a research assistant who has entered a household for interviewing on your assignment list. There are 5 people present in the household, but there were more people who slept in the house last night but have since left the house.

Participant 1: Introduce yourself, the project/research, and the purpose of the survey. Obtain informed consent. Begin to complete the Household Listing module.

Participant 2: You are the household head. Ask if there is any compensation for your participation. After Participant 1 answers your question to your satisfaction, agree to provide consent to be interviewed for the survey. Provide the following information **only when asked**: Your name is Moses. There are 5 people in your household. Yourself (male aged 15-49), your wife (Patricia, aged 32), your mother (Clare, female, aged 52), and your 2 children (boy, Safani aged 4 and a girl, Gloria, aged 10). Your sister-in-law (Hilda, aged 15-49) and her son (Prosper, aged 3 years) slept in your house last night, but don’t usually stay with you and have since left the household to their village and won’t be returning today.

Example Role Play 3 (2 volunteers):

Participant 1 has just finished interviewing the household head for the Household Questionnaire. The household head is an eligible woman for completing the Women’s Questionnaire (Participant 2).

Participant 1 (interviewer): Inform the woman that you have completed the Household Questionnaire, and would now like to ask her some additional questions. Obtain informed consent and begin the Woman’s Questionnaire. Make sure that her answers make sense and agree with each other (i.e. age and date of birth) and probe when asking the fertility questions.

Participant 2 (household head / woman): Approve the request for the Woman’s Questionnaire and answer the questions you are asked.

* You were born in February, 1978. You were 34 at your last birthday.
* You have attended school. Your highest level was Primary 6.
* Read the literacy card, but struggle reading some of the words.
* Your main religion is Catholic.
* You belong to **[insert local example]** ethnic group. You have given birth 4 times. The most recent birth was 6 years ago, but the baby died shortly after birth.

Example Role Play 4 (4 participants):

Household scenario:

Cluster 2, Dwelling number 5, Household number 1.

There are 3 adults:

* Household head – 32 years old
* Wife of the household head – 26 years old
* Wife’s sister – 36 years old, visiting and slept in the household last night

There are 3 children:

* Household head’s 18 month old son and 3 year old daughter
* The wife’s sister has a 4 year old daughter who slept at the household last night. The daughter had a fever yesterday and was taken to the nearby health facility where she was tested for malaria. She was given an ACT the same day.

There are 2 rooms for sleeping. All of the children slept under an ITN last night. None of the adults slept under an ITN, both procured from a health facility within the last year.

There will need to be 4 participants who will act out the roles of the interviewer, household head, wife of the household head and the wife’s sister. This role play should be conducted as a full interview, as you would do in a normal interview setting.

**TRAINEE / INTERVIEWER EVALUATION**

**Evaluation 1: Informal observation**

The staff facilitating the interviewer training should monitor and evaluate individual interviewer trainee performance during the training days and field pilot day(s). Interviewers should be actively engaged by attentively listening to all lectures and participating openly in classroom discussions, role plays and/or scenarios. Each interviewer trainee should come to all training days prepared to learn, as demonstrated by brining all required materials and completing the daily assigned homework and/or readings from the printed manual(s) or other materials given.

It is important for training facilitators to assess the trainee’s ability to grasp, retain, and apply the important concepts and methodologies related to all aspects of the survey. Interviewers should progress through training from starting as a novice trainee and moving towards becoming a competent interviewer, who is capable of performing all tasks related to their roles and responsibilities during data collection. These informal observations will be important to record for decisions related to selection of the final interviewers and team leaders who will be formally hired on for the main survey data collection activities.

It is recommended that approximately 10% more interviewers are trained than will be retained / hired at the completion of training and for the start of data collection. For example, a project may choose to train approximately 40-45 interviewers and at the completion of training, they will select 6 of the best performing trainees to act as team leaders and 30 of the next best performing trainees to act as research assistants. The remaining people who have not performed well or do not demonstrate an ability to retain and apply the training materials during the field pilot days should not be hired. Additional trainees who performed well but were not selected for hiring at the end of training may remain as alternate interviewers in case there are any dropouts during the survey data collection period.

**Evaluation 2: Homework assignments**

RADAR has developed a series of template homework assignments with a variety of questions that can be selected and assigned to interviewers for completion daily at the same time as when they complete their required readings from the manuals. The homework assignments are meant to be simple and the answers should be found by reading portions of the manual. The format of questions vary from fill in the blank, true / false, matching, multiple choice and short answer questions. Having homework to do alongside reading the manuals will encourage the trainees to actively read all important sections of the interviewer’s manual in order to find the correct answers and learn the material.

These homework assignments are to be completed individually by each interviewer and are due the next morning to the training facilitators. Each trainee will receive marks for completion that will go towards determining selection at the end of training. The training facilitators should review the responses at the start of each new day of training in order to ensure the content of the manual is understood and to answer any questions or clarifications that interviewers may have. Areas that are found to be poorly understood across numerous trainees are important to note as these topics may require addition training or review.

**Evaluation 3: Tests and quizzes**

During training, all trainees should be formally assessed through written tests and impromptu ‘pop’ quizzes that assess their ability to retain and apply the concepts of the survey and methodologies that were trained on in the days prior. RADAR has developed a series of template written test to formally assess interviewer performance for the Household, Woman’s, Man’s, and Under 5 Child’s questionnaire. These should be adapted and translated specific to the program evaluation and context of where the survey is being implemented. The formal written tests may be administered after the training on each module in the questionnaire has been reviewed in the classroom setting and that the trainee has read the materials in the manuals. In addition to scheduled written tests, training facilitators may introduce pop quizzes (i.e. trainees are not aware of the test) to assess interviewer performance and ability to problem solve and think critically without preparation. Both of these formats of tests and/or quizzes should be graded and a record of their grades retained. The performance on the tests and quizzes should be used in collaboration with informal observations in order to determine the selection of team leaders and interviews at the end of training, prior to starting data collection activities.

**Evaluation 4: Review incoming data**

During training field pilots and survey data collection activities, the data collected using tablets and the completion of control forms will be submitted and/or compiled for review by the survey coordinator, data manager and central office. Incoming survey data and control forms should be carefully reviewed to identify any issues with data quality and reported back to the teams in order to monitor, evaluate, and improve interviewer performance and ensure quality data is being collected at all-time points during the main survey work.

**Evaluation 5: Daily debriefs**

During the training field pilot days and the main survey data collection activities, all interviewers, team leaders, and supervisors / coordination team members should hold daily debrief meetings once they have returned from the field work in the evening. The purpose of these debrief meetings is to discuss what went well, any issues or challenges that arose in the field, and to provide decisions on improvements / solutions for moving forward, including resolving issues that may negatively impact data quality or team dynamics. If it is not possible for all team members to be present at the debrief, the survey coordinator will be responsible for disseminating the content of the discussions to all persons in order to ensure everyone is working in the same manner and to improve data collection based on the lessons learnt from other teams. This is particularly important in the instance that the same challenge occurs at a later date for a different team; having the knowledge of how to resolve the challenge will help teams in the future on how to proceed and avoid continued delays for the same issues.

A standard agenda can be implemented and reviewed at the end of each fieldwork night, including reporting on the following topics:

1. What went well today?
2. What were the issues / challenges and how can these issues be remedied and/or improved?
   1. Provide any additional training with the entire group present, if needed, including: reviewing question intent or definitions, ensuring that common areas of challenge are addressed and that the key concepts related to survey methods/protocols are well understood by all members, and reviewing any changes to field procedures (completing assignment forms, data submission, etc.).
3. Updates to the schedule (any changes to fieldwork days, confirm dates and time of daily departure, team composition, etc.)
4. Issues related to team welfare, payment, etc. (e.g. accommodation, contracts, per diems, payments to local guides, vehicle issues, airtime)
5. Recognition and appreciation of the team members
6. Any other business

It is recommended that the survey coordinator and/or others who are providing central supervision should compile and type notes from these debriefs in order to document field work challenges, decisions made, and other pertinent details in order to improve upon the process throughout all time points during a project’s evaluation (i.e. baseline, midterm, endline evaluations).