

# Training enumerators

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# Objectives

The goal of the training is for the entire survey team to learn

- ▶ The project, its goal, and the respondents
- ▶ The content of the questionnaire and purpose of each question
- ▶ Data collection protocols
- ▶ Interview skills: how and when to probe, ensure confidentiality
- ▶ Roles and responsibilities of the entire research team
- ▶ To work as a team

# Preparing for a training

## Enumerator manual

- ▶ Study objectives and project team
- ▶ Sample areas and the respondents
- ▶ Team structure
- ▶ Instructions on using the tablets
  - ▶ DIME's SurveyCTO guide for data collectors
- ▶ Survey protocols

# Preparing for a training

## Enumerator manual

- ▶ Consent process
- ▶ Instruction for each question, skip pattern, hints
- ▶ Instructions for sensitive questions
- ▶ Taking permissions (school principal, village head)
- ▶ General code of conduct
- ▶ Safety instructions, if any
- ▶ FAQs

# Preparing for a training

## Training agenda

Number of days depends on length and complexity of the questionnaire. A typical agenda:

- ▶ Introductions and overview of study (0.5 days)
- ▶ Review of survey protocols (0.5 - 2 days)
- ▶ Review of research standards and confidentiality (0.5 days)
- ▶ Review of paper questionnaire (2.5 - 4 days)
- ▶ Introduction to tablets (0.5 - 1 days)
- ▶ Review of questionnaire on tablet (2-3 days)
- ▶ Field testing (1-2 days)
- ▶ De-brief, team selection, and hiring (1 day)

# Preparing for a training

## Quizzes and tests

- ▶ Understanding of survey content
- ▶ Reading skills in different languages
- ▶ Numeracy skills
- ▶ Response in adverse events
- ▶ Working with a tablet

## Preparing for a training

### Quizzes and tests: Example

Kadiatu was surveyed by our project's enumerator on a tablet two years ago in 2019. She then moved to Freetown to work in her brother's shop. But the shop closed down, and she moved back to the village last month. Since she was not in the village last year, we did not interview her, but this year she is available. Should we interview her now?

- ▶ Yes
- ▶ No
- ▶ Maybe, it depends
- ▶ It depends on her age
- ▶ Don't know

# Preparing for a training

## Logistics

- ▶ Training venue, projector, internet
- ▶ Printed questionnaires, enumerator manuals
- ▶ Charged tablets
- ▶ Supervisors to help track the progress
- ▶ Decide how to invite participants
- ▶ Train more people than you plan to hire
- ▶ Budget for extra days



## Preparing for a training

- ▶ Enumerator attendance and performance tracking sheet
- ▶ Logbook to track any changes to the questionnaire
- ▶ Ice breaking activities, energizers and games
- ▶ Pre-training of support staff

## During the training

- ▶ Role plays
- ▶ Mock interviews
- ▶ Protocols for adverse events
  - ▶ accidents, theft
  - ▶ misconduct by respondents
  - ▶ safety threats
- ▶ Regular feedback sessions (both ways!)
- ▶ Include some breaks

## Field practice

- ▶ Selection of the correct respondent
- ▶ Proper introduction
- ▶ Obtaining consent
- ▶ Clarifications and polite probing
- ▶ Familiarity with the survey and confidence
- ▶ Choosing the correct options

## Field practice

- ▶ Language proficiency
- ▶ No enumerator bias or judgements
- ▶ Interactions with the respondent
- ▶ Patience and attention to detail

## Assessing enumerators

- ▶ Scores on regular quizzes and final test
- ▶ Field practice
- ▶ Participation
- ▶ Performance in mock interview and tablets
- ▶ Interpersonal skills
- ▶ Previous experience

## Remote training during COVID-19

## Remote training

- ▶ Ensure enumerators have the required equipment for phone surveys
- ▶ Break the training plan into a number of small sessions to facilitate better comprehension and retention
- ▶ Make videos, quizzes, and animations for better retention
- ▶ Plan a smaller day (around 4 hours)
- ▶ Send all materials in advance to reduce lecture time

## Remote training

- ▶ Use polls and reactions embedded in Zoom
- ▶ Train a small team of senior field staff ahead of the actual training and use break-out rooms
- ▶ System to track attendance and follow-up
- ▶ Consistently call on surveyors



## Remote training: Challenges

- ▶ Connectivity issues
- ▶ Data security issues

## Additional training for phone surveys

- ▶ Correctly identify respondents
- ▶ How to engage respondents on the phone
- ▶ What to do if the respondent is asking other family members
- ▶ How to respond if respondent hands the phone to someone else mid-survey
- ▶ If recorded, train on how to use the recording app

## Other relevant details

- ▶ Special trainings for anthropometric measurements or blood samples
- ▶ Sexual harrassment training
- ▶ Compensation, benefits, health insurance
- ▶ Data confidentiality clause
- ▶ Survey logistics like transportation and accommodation
- ▶ Training the back-checker separately

Thank you!