



3 Rapid Mobile Phone-based (RAMP) survey toolkit

Training a RAMP survey team: guide for trainers

Focusing on a LLIN post-campaign survey

November 2012

with support of

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 International Federation
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RAMP - volume 3

Training a RAMP survey team: guide for trainers

Strategy 2020 voices the collective determination of the IFRC to move forward in tackling the major challenges that confront humanity in the next decade. Informed by the needs and vulnerabilities of the diverse communities with whom we work, as well as the basic rights and freedoms to which all are entitled, this strategy seeks to benefit all who look to Red Cross Red Crescent to help to build a more humane, dignified, and peaceful world.

Over the next ten years, the collective focus of the IFRC will be on achieving the following strategic aims:

- 1. Save lives, protect livelihoods, and strengthen recovery from disasters and crises**
- 2. Enable healthy and safe living**
- 3. Promote social inclusion and a culture of non-violence and peace**

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Foreword

From the beginning, insecticide-treated mosquito bed net (ITN) distribution has been closely linked to innovative evaluation. The first integrated ITN campaign, carried out in Ghana almost a decade ago, was also the first use of handheld computers for public health evaluation in Africa. The resulting rapid, high quality evaluation had an immediate impact. Within six months of that evaluation, WHO and UNICEF had endorsed mass, free ITN distribution campaigns, laying the policy foundation for the global effort we see today. As the global ITN scale-up has progressed, intensive evaluation has created a knowledge base that allows informed decisions and best practice on delivery methods, hang-up strategies and methods of improving utilization. It is this thoughtful approach to programme planning that has maintained international, national and donor confidence in the overall effort.

A key to rapid implementation has been the high degree of country ownership of bed net programming. However, the overall evolution towards country ownership has not advanced as fast for evaluation as it has for other programme elements. While it is now commonplace for countries to plan, budget and implement sophisticated ITN delivery strategies, state-of-the-art evaluation usually requires external support for financing and technical expertise. A principal reason for this lack of local ownership of evaluation has been that the evaluation tools have not been appropriately adapted to the local requirements.

The three volumes making up the Rapid Mobile Phone-based (RAMP) survey toolkit are an effort to empower local ownership of evaluation. The toolkit is part of a vision that high quality evaluations should be able to be conducted using the expertise and resources available at the district level. It takes advantage of two technologies: locally-available mobile phones and EpiSurveyor (now re-named Magpi) software which enables mobile phones to be data collection platforms. Importantly, it is simplified without being simple. It brings within reach of all programme managers state-of-the-art methodology in survey sampling and the use of mobile phones to collect data. With it, local programme managers will not only be able to respond to concerns expressed at national and local level, but also to questions posed by international donors.

During an early integrated measles vaccination/ITN campaign in northern Uganda, a doctor told me that if the measles campaign was successful he could “close the measles ward”. He added that if the bed net campaign was equally successful at controlling malaria he could “close the hospital”. The developers of the RAMP toolkit hope that enhancing evaluations will be one more step towards our ultimate goal of closing the hospitals.



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Editing by Vivienne Seabright.

Terminology

In this manual, the personnel involved with the RAMP survey are referred to as follows:

Survey coordinating group: this group may be called the “steering committee”. Representation on this group is likely to be at high level from the organization responsible for the survey, stakeholders (including the Ministry of Health) and donors. The health programme manager should attend this committee, as well as the person appointed to be the survey coordinator and the data analyst. This group is responsible for overseeing the planning of the survey, and for ensuring that all technical and practical considerations have been taken into account.

Supervisory support and monitoring team (SSMT): this group is likely to include members of the survey coordinating group. It acts as a support group in the field, ensuring that the procedures as prescribed for the survey are followed, and that supervisors and interviewers are carrying out their duties appropriately.

Survey team: this group consists of all the personnel involved in the field survey, including the survey coordinator, local data manager and analyst, supervisors, interviewers, drivers, local guides and any administrative support staff and volunteers.

Field survey team: this group carries out the interviews in the field. It consists of interviewers and supervisors, supported by drivers and local guides.



01. Introduction

The Rapid Mobile Phone-based (RAMP) survey has been designed as part of a broader effort by the International Federation of Red Cross and Red Crescent Societies (IFRC) and other partners to develop tools and procedures to monitor and evaluate health programmes that will enable managers and other decision-makers to carry out a health or development survey rapidly and act on the results more quickly.

This training manual is a key element in the RAMP survey and is a main tool for preparing trainers to facilitate the training of the interviewers and supervisors who will carry out a survey in the field. The example given is a coverage survey that will take place to measure the ownership and usage of long-lasting insecticide-treated nets (LLINs) following a national or sub-national distribution campaign. While this manual is about a malaria survey, the training process described can be used to conduct any health or development survey. The malaria survey may be more complicated than other surveys because data are collected about three different items (households, persons and nets).

Training is an important part of the survey plan. A quality survey depends on quality data collection by trained individuals. Well-trained field survey teams are essential to the success of the survey. Trainees who successfully complete the training will work in teams and travel to different parts of the survey area to conduct household interviews in the communities.

Training a RAMP survey team: guide for trainers has two companion publications, *Designing a RAMP survey: technical considerations* and *Implementing a RAMP survey: practical field guide*. The three volumes making up the RAMP toolkit have been specifically designed to be a management tool for health and development programme managers in Red Cross Red Crescent National Societies, non-governmental organizations, government departments, etc., to oversee the planning, implementation and analysis of a rapid survey. The example used in the toolkit is a survey to measure the effect of a mass LLIN distribution campaign. This training programme for the survey field teams is fully compatible with the information and survey methodology provided in the technical manual and field guide. The technical content presented in the training has been reviewed by subject matter specialists, and the survey methodology to be applied in the field uses standard sampling methods.

A unique aspect in this RAMP survey is that the data will be collected and stored using mobile phones. The data will then be easily uploaded to a web-based database that facilitates examination, cleaning and analysis of survey data. This tool is easy to use and will significantly reduce the time and effort needed to complete the data entry and analysis.

Participation by the trainees in this training and in actually carrying out the survey is expected to build local capacity to carry out surveys to evaluate malaria prevention and control and other health and development programmes.



02.

Using this manual

This RAMP survey training manual provides all the instructions and technical and logistics materials needed to conduct a five day training course for interviewers and field supervisors. Using this manual, it will be possible to compile a basic “toolkit” which should be provided to all trainees at the beginning of the training. The contents should be organized in a logical way and include all the necessary materials for the interviewers and the field supervisors. Items should be added as the training proceeds. Certain items of the toolkit might be brought to the field by the survey team members. The toolkit can be presented in different formats (e.g., a binder, a file) depending on the local resources and preferences.

Training sessions

The training manual is organized into 15 sessions, as follows:

Session 1: Opening remarks, prayer (if appropriate), introduction of participants, icebreaker activity, overview of agenda, training ground rules, administrative issues, followed by a brief overview of malaria prevention and control.

Session 2: An outline of the survey, giving the background and purpose of the survey, and an overview of where, when, who and how.

Session 3: An overview of the survey questionnaires. All participants need to be able to understand the content and intent of the questionnaires and the possible responses. Types of bed nets are described.

Session 4: Some of the key terms for understanding the survey questionnaires are discussed. There is a focus on basic information about the rapid diagnosis of malaria and the drugs used for malaria treatment. Information and practice on informed consent before conducting an interview is included. Basic information about use of the mobile phone in health surveys, specifically the RAMP survey for malaria, is provided. Details on type of mobile phone, setting, functions, navigation and so on are given, with participants following along with a mobile

phone. There is a practical session on conducting an interview, with participants using the mobile phone to enter data.

Session 5: Role-play on conducting the interview. Using a case scenario provided by the trainer, two trainees will role-play an interview in front of the other participants. As the role-play is being carried out, all trainees will be expected to follow along using their mobile phone. Feedback is provided at the end of the interview by the actors, trainees and the trainer. Critical issues such as the definition of a household, household head, sleeping space and eligible respondent are addressed. To help trainees fill in the questionnaire dealing with bed nets, various types of bed nets in use in the locality will be demonstrated.

Session 6: The characteristics of an effective interview are identified, and tips and techniques for successful interviewing presented.

Session 7: Further practice on conducting an interview and entering data, using case scenarios provided by the trainer.

Session 8: During field work, there are a number of procedures that need to be carried out to ensure the success of the survey and to obtain high quality data. This section leads the trainees through these procedures, and provides the chance to discuss issues that may arise and how to deal with them. The roles and responsibilities of the interviewers and the supervisors during field work are discussed.

Session 9: Guided by the trainer, the participants will carry out an exercise to increase their understanding of the household selection process. The creation of segments, selection of a segment from which to choose households to be surveyed, and the random selection of households to be interviewed will be covered.

Session 10: All trainees will take part in a field practice activity near the training site. Teams will practise and apply the field procedures as prescribed during training. Each interviewer and supervisor is responsible for carrying out at least one interview, collecting data on his/her mobile phone. The data collected will be sent to the server.

A second part of **Session 10** takes place towards the end of the training. All interviewers and supervisors will take part in a second field practice activity near the training site. Each interviewer and supervisor is responsible for carrying out at least two interviews and ensuring that the data collected are sent to the server.

Session 11: Back in the training venue, participants will carry out a self-assessment activity to judge their own performance during the field test. This will be followed by discussion to bring out the highlights of each person's experience in the field. Large group discussion will focus on challenges or situations that may be encountered and the ways to address them. The data collected by the participants will be shown and discussed.

Session 12: This session ensures that all teams will be well-prepared as they head to the field. The topics covered include fieldwork schedule and team itineraries, using maps, field expenses, accommodation, transport and communications in the field. On the final day of training, daily allowances will be distributed to each individual, and all teams will be given the needed field supplies, equipment and materials.

Session 13: This session targets supervisors only, and includes activities and information that will help the supervisors carry out their field responsibilities. The trainers will meet with all supervisors to discuss supervisor and team member responsibilities and logistics (maps, schedules, taking care of the mobile phones, troubleshooting, administrative issues, contacts and communications). Supervisors will sign for equipment and collect field supplies and materials. Technical issues such as the process for the selection of households, data quality procedures and monitoring the performance of interviewers will be reviewed.

Session 14: This session provides a summary of the training and contains an evaluation exercise.

Session 15: This is a post-survey wrap-up and debriefing the day after completion of the interviews. At this session, the preliminary findings will be reviewed and a debriefing of the survey will take place. A certificate of participation will be awarded to participants.

Each trainer(s) must have a copy of this training manual, which is the basic tool for preparing the training event and effectively leading it. The complete manual is available at the RAMP website (www.ifrc.org/ramp). Refer to the sample agenda (see below) to see where the 15 sessions fit into the training programme.

All sessions are designed for both the interviewers and the survey field supervisors, with the exception of session 13 which is designed for the field supervisors only, while at the same time interviewers receive support if required for specific topics. Sessions 1 to 14 are part of the five day training programme, and session 15 “Post-survey reflection and debriefing” is to be held immediately after the survey.

Features of the manual

The sessions have some common features to help make your presentations easier and most effective. At the beginning of each session there are generally five elements stated:

1. overall goal of the session
2. objectives: list of objectives that the steps in the activities are designed to accomplish
3. time: an estimate of the amount of time needed to implement all the steps designed for the session
4. methods: learning methods used in the activities
5. materials/preparation: a list of materials that the trainer must ensure are ready before the session and the tasks that the trainer must do before the session and its activities can be presented

These are followed by the detailed steps needed to accomplish activities, listed in the order recommended for implementation. Handouts, pre-prepared flipcharts, PowerPoint presentations, worksheets, job aids, forms and other trainer’s tools that are needed for each activity are listed. These tools are identified by their titles.

Special features for the trainer to note include:

- *Italics font* = to read out loud to the participants
- *Regular font* = specific information, instructions or questions for the trainer to read or closely paraphrase to the participants
- *Arrow (➔)* = symbol that highlights specific questions to ask
- *Shaded box around text* = special technical or summary information to share with the participants

Advance planning: things to know and do

A number of decisions and actions have taken place (often by the survey coordinator or the health programme manager) before the training takes place and the trainer(s) get involved. Advance planning is vital to the success of the training, helping to ensure that the training gets off to a good start, and that the trainer is well-informed, properly prepared and well-supported.

Before training is carried out, the following conditions should have been met:

- A decision has been made to evaluate the bed net distribution using a RAMP survey.
- A RAMP survey coordinating group has been established, with members committed to the survey and to the mobilization of required resources.
- The survey design has been completed.
- The 30 clusters from which households to be interviewed will come have been selected.
- First-level segmentation of cluster if accurate sub-cluster administrative data and maps are available (e.g., wards, villages).
- The draft survey movement plan/schedule has been prepared (indicates the teams' itineraries).
- Preparatory steps for the survey planning and logistics (e.g., preparation of a work schedule/chronogram, purchase and preparation of the mobile phones for the training and the survey, recruitment of the interviewers, training agenda and master support materials adapted and prepared) have been completed. Many of the outputs of the preparatory stage become inputs needed for successful training. A data manager has been recruited for the survey, and he/she will also be a co-trainer.
- Key stakeholders have made a commitment to review the results that will emerge from the RAMP survey, and carry out follow-up activities.

Who does what? (organizing the training)

- Clarify roles and responsibilities of the health programme manager, the survey coordinator, the data manager and the trainers/resource persons.
- Establish the organizing structure for the training and the survey. For example, a core training team might be established, with a training coordinator to lead the planning and implementation of the training. The survey coordinator may serve as the training coordinator, or be one of the trainers. Some members of the survey coordinating group may be involved in supervising and supporting the survey fieldwork, according to a plan for supervision. These persons are called the survey supervisory support and monitoring team (SSMT).

Who? (trainees)

Participants may come from different organizations and areas of work. Generally, the trainees will be staff or volunteers of the Red Cross Red Crescent

National Society, staff of non-governmental organizations (NGOs), individuals from local universities or research centres, and/or staff of the health team of the Ministry of Health (MoH) or other government agencies. The survey coordinator will have played a key role in the recruitment of the field survey teams, and will have taken the following into account:

- What are the selection criteria for the trainees?
- How will the trainees be recruited? Will they be appointed or will there be a competitive selection process?
- Who will be responsible for the recruitment?
- Will the trainees be expected to sign a contract?
- How will team supervisors be selected? Will the supervisors be selected before the start of training or during the training?
- If supervisors are to be selected during the training, which criteria will be used to assess the candidates?

A Red Cross Red Crescent National society might decide to include additional trainees who will not be directly involved in the current survey, as part of a strategy to build capacity by increasing the number of individuals who are familiar with the RAMP survey methodology.

How many? (number of trainees and trainers)

The number of trainees will depend on factors such as the number of households to be surveyed, the number and composition of the field survey teams, survey budget and the duration of the survey. The trainer/trainee ratio is important. Class size should be conducive to effective learning and optimize each trainee's experience and chance to succeed. A class size of up to 30 people works well, especially for allowing the trainers to monitor the mobile phone use by the participants, and for incorporating the participatory activities and the field practice into the training experience. At least two trainers are needed to deliver the training programme effectively. When class size exceeds 30 people, it is advisable to provide additional trainers.

Who? (trainers, resource persons)

It is essential that each person selected to be a trainer for this training programme should understand the programme and its methods and materials. Ideally, the trainer will have experience in adult education and the facilitation of training events. It is also necessary that he/she is a subject-matter expert in certain aspects of the training (e.g., using mobile phones for a survey, community-based surveys, post-campaign LLIN surveys, field procedures). The survey coordinator will usually play a key role in training, serving as the training coordinator and the chief trainer. The data manager can serve as the co-trainer. Besides the trainers, resource people may also be invited and deliver part of the training programme. A decision about the number of trainers will need to be made. Will there be guest speakers or resource people? Will there be other persons present, aiming to build local capacity to deliver the training programme?

Where? (training location and room set-up)

Care needs to be taken in choosing the venue for the training. A visit to the facility chosen for training is important. Sometimes it is possible to get a venue at low or no cost. Cost alone, however, should not determine the venue that is chosen. A visit to the facility can help determine if the site meets the training needs and criteria. Room layout needs to be considered since it can play an important role in adult learning. The environment can help ensure the physical comfort of the participants, facilitate interaction among the participants and enable the successful execution of the training design. It is essential that there

is space for the trainers to move about, especially during the small group activities and when the participants are using the mobile phones.

How long?

The curriculum presented in this manual is for a training duration of five days, timing which is highly recommended. When establishing your training agenda and curriculum, however, this duration might be shortened, with the appropriate adjustments made to accommodate your needs and training design. See the RAMP website (www.ifrc.org/ramp) for examples of adaptations of the agenda for different RAMP malaria surveys.

When?

The timing for the training is heavily dependent on the timing of the survey. The training should take place immediately before the survey fieldwork.

How? (training approach)

The training programme has been designed using adult education principles and methods. It is action-oriented, with activities designed so that participants are involved, and can learn with and from others. The training design responds to what is known about different learning styles and supports adult learning. The methods include mini-lectures, small and large group discussions, role-play and field tests. There is ample opportunity for groupwork, helping to build trust and teamwork. Overall, the intention is to provide a learning environment in which learning is fully supported and peer-support and teamwork encouraged.

The trainees' performance will be evaluated during the training. Evaluation will be carried out using methods such as informal observation, review of data collected by the trainee, self-assessment and performance on a quiz. The evaluation is important in assessing the progress of the participants, and providing feedback both to the trainees and the training team. If any area of difficulty is identified, the trainers should be prepared to provide additional support to the trainee (e.g., through one-to-one coaching or peer support). Difficulties might also signal a need for the training programme to be revised or adjusted.

What resources?

A budget will have been prepared under the guidance of the survey coordinator well in advance of the training. Training costs can be a high proportion of the overall budget and should be carefully identified for inclusion in the budget. Training is often part of the usual work of a Red Cross Red Crescent National Society staff or volunteer or MoH staff member, so trainees might not be paid extra for attending the training but could receive allowances for expenses such as travel, accommodation and meals. Other expenses may include the cost of the training venue, equipment rental, training supplies and materials and transportation for the field practice outings.

PowerPoint presentations

In this training, a number of sample PowerPoint presentations have been provided that can be adapted for use by the trainer in delivering the relevant sessions. Remember that a PowerPoint presentation is a visual aid and not a teaching technique. The trainer should use the slides as a focal point for the subject matter to be discussed. If the presentation is to be provided to the participants as a handout the survey coordinator and training team need to decide on the format desired. The PowerPoint presentations can be downloaded from the RAMP website (www.ifrc.org/ramp) and adapted accordingly.

The following presentations are included in this manual.

- Session 2: Overview of the Rapid Mobile Phone-based (RAMP) survey
- Session 4: Mobile phone basics and introduction to EpiSurveyor¹
- Session 8: Fieldwork procedures: key steps and activities. Some of the slides in this set can be used in session 9, Fieldwork procedures (Part 2): selecting the households to be interviewed, when more details about the fieldwork procedures are addressed. The slide set also includes slides that can be used by the trainer to introduce exercises and recap activities.



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¹ During production of the RAMP survey toolkit, news came that EpiSurveyor would be changing its name to Magpi in January 2013, and the main website will change to www.magpi.com. The web application will retain a very similar layout and there will be video demonstrations of the new improved features of Magpi. It is expected that the instructions and information in this training manual will therefore still be relevant. The RAMP website (www.ifrc.org/ramp) will be updated to reflect any important changes.



03.

Trainer preparation

Two to three weeks before carrying out a RAMP survey training workshop using this manual, the following steps should be taken:

Training coordinator

- The training coordinator should meet with the survey coordinator (if they are not the same person) to obtain background information about the survey and the National Malaria Control Programme (NMCP). Go over the status of the preparatory steps for the training event that have already been taken. Work that has been done to prepare the survey fieldwork (e.g., survey design, selection of the sample clusters, survey movement planning, recruitment of the data manager, recruitment of the trainees) should be part of the review. Obtain copies of the International Federation of Red Cross and Red Crescent Societies' (IFRC) *Designing a RAMP survey: technical considerations* and *Implementing a RAMP survey: practical field guide* for your information. Obtain a copy of this training manual to use for the pre-event preparation, and during the training. There will be a number of important steps and tasks to be carried out prior to the event to ensure its success. Be clear about which preparatory activities are to be done by the survey coordinator and which ones by the training coordinator or other trainers.
- Review the sample training agenda and curriculum and adapt them to fit your training needs and survey context. The participation of other members of the training team in this activity is important and the work of adjusting materials may be divided among your training team.
- Following the meeting, carry out those tasks for which you are responsible.

Trainers

- Participate in a review of the training agenda and curriculum (process to be led by the survey or training coordinator) and carry out those tasks for which you are responsible.
- Be well-prepared for the training. Read *Training a RAMP survey team* before the actual training. (Some individuals might also like to briefly review parts of the companion volumes, *Designing a RAMP survey* and *Implementing a RAMP survey*) You should take one or two days to read through the entire curriculum and prepare.
- Become thoroughly familiar with the technical content of the sessions, and pay careful attention to preparing by using the suggested training methods and tools. Review with attention to detail each session of the training event in which you are actively involved so that you know what is needed in terms of materials and preparation. Go over the sample PowerPoint presentations and other sample training tools (handouts, worksheets, checklists, exercises, quizzes) and in collaboration with the survey/training coordinator, make any changes necessary to fit your training needs and the local context.

- You may need to practise a role-play or other activity with the training coordinator and/or fellow trainers.
- If you have a co-trainer, discuss how you will divide the work.
- Activities may need to be adapted depending on the number of trainees. For example, if an activity calls for a small group discussion and you only have ten participants, you may decide to change the activity to a large group discussion.
- Obtain the training materials or make the necessary copies listed below.

Materials and copies needed prior to training

- list of the 30 clusters selected for the survey
- draft of the survey movement plan/schedule (itineraries for all teams)
- area maps of the selected areas to be surveyed
- list of participants recruited for the training
- list of resource persons
- one mobile phone for each member of the training team and each trainee
- flipchart/newsprint paper, stand, markers and tape, or blackboard, whiteboard, eraser, chalk or markers
- microphones for use in the role-play activities
- laptop, LCD projector and screen (according to preference and optional, since much of the training has been designed to be carried out without this equipment, in case of power failure during training)
- watch or clock to keep track of time
- one copy of the agenda for each member of the training team, resource persons and participants
- one copy of the basic trainee's toolkit for each participant (make sure agenda and other materials have been modified if needed). The contents of the supervisor toolkit will contain more materials than those provided in the interviewer's toolkit. The appropriate number of copies of the various handouts and other tools will need to be made. Some of these may be distributed at the time of the session in which the tool is introduced.
- one of each type of long-lasting, insecticide-treated mosquito net (LLIN) and its packaging that were distributed during the last mass campaign or door-to-door campaign, is distributed through routine health services, or generally sold in markets or pharmacies in the survey areas
- samples of the net retreatment kits commonly used (if applicable to the malaria programme, with retreatment kits available through clinics or in markets or pharmacies)
- samples of artemisinin-containing combination therapy (ACT) and other anti-malarial medication and of fever-reducing medications that are commonly used in the malaria and health programmes in the survey locality
- a cash box to ensure necessary funds for paying daily allowances etc. are securely stored

Assessing learning and performance

The trainees' learning and performance should be evaluated regularly during the training. The assessment is important to gauge the progress of the trainees, and provide performance feedback to both the trainers and the trainees. This feedback can be used to identify and address areas of difficulty and support the trainee so that the learning objectives are attained. The intention is to provide an environment in which learning is fully supported. In this training, peer-support and teamwork is strongly encouraged. If an area of difficulty is identified, the trainers should provide additional support to the trainee (e.g., through one-to-one coaching or pairing of the individual with a "stronger" one).

A number of methods have been used in this training to support and assess learning and to evaluate performance. These are outlined below.

Oral drill: After activities the trainer can ask questions covering the content of the activity, and invite participants to respond.

Museum walk: In the sample agenda, a museum walk is used to open day 2. The method could also be effectively used at another time slot in the training programme. In a museum walk, the trainer creates a range of visual materials about concepts, topics and subject matter and displays this in the training room in a *museum* or *gallery* style. The participants walk around the "museum" examining the various "displays" and comment on the trainer-created prompts or questions that are posted at each station. This method has been used once in the sample agenda but can be adapted and used to review or reinforce a variety of concepts, topics and subject matter. At the end of the museum walk, each group can give a quick oral presentation about a display to the reconvened group. The museum walk can help build or reinforce the participants' awareness of concepts, reinforce key messages, and help facilitate learning.

See Session 4 for instructions on the museum walk as applied in the sample curriculum for the malaria survey.

Self-assessment: After the first field practice, each trainee completes a self-assessment activity, allowing them to recognize where they might need some additional information or assistance.

Quiz: The quiz helps to review content. There is a sample of a true/false quiz and answer key in this training in the supervisor-only Session 13, Getting ready for the field (Part 2). There are also true/false questions in the PowerPoint presentation in Session 8.

Performance on interviews: During the training, the data that are collected by each trainee using their mobile phone can be reviewed by the training team. This can be done on at least two occasions: after the role-play exercise and after the field practice. Each trainee's name will be part of the database of an interview, thus it will be possible to view and assess each individual's data.

Field practice: Two field practice visits will be organized during the training and these give the opportunity to apply what the participants have learnt to date during the training, and for the trainers to provide specific and constructive feedback to the participants. The practice session and the feedback help to ensure the transfer of learning to the field survey.

Frequent testing for understanding, recap of material covered during training, and other ways to support and evaluate learning (e.g., competitive games that are content-specific requiring the participant to use the course materials in order to win, or a “syndicate presentation” in which a small group of learners makes a cooperative presentation on specific topics to the rest of the group) can also be incorporated into the training programme as you adapt and implement this training for your survey.

Help on leading training: suggestions for the trainer²

Managing time: The times suggested for each activity in this trainer’s manual are approximate. You will know your audience best and should be able to judge from their interaction and factors like their body language and participation in recap activities when more or less time is needed to meet their learning needs. The goal, objectives and activity steps at the beginning of each session provide the structure and important content that must be covered. If you lose control of time or the audience goes off topic, use ground rules established at the beginning of the training session to get back on topic. It may be necessary to adjust the agenda as the training progresses, and this should be done keeping in mind the need to ensure that all the content must be covered before the trainees depart for the field. For example, if it is determined that the trainees need extra time to master the questionnaire content, you may decide to introduce the mobile phones on the second training day instead of the first day (thus leading to a further revision of the agenda). Depending on your organizational culture you might also ask trainees to do some “homework” (e.g., take the mobile phones with them at the end of a training day and get familiar with the mobile phones and entering data, or go over some of the handouts). The contact between the survey team and the supervisory support and monitoring team during fieldwork provides additional opportunities for reinforcing learning.

Taking part in activities and having discussions help participants to learn. Your job is to get participants interested and listen to them with respect and attention. The suggestions below can help you conduct the sessions more effectively.

Group talk:

- When a person talks, thank that person for speaking.
- Avoid stopping people when they are speaking. If you must stop someone who is talking too long, do so, but say you are sorry.
- Encourage as many people to speak as possible. You can help this by saying: “I’d like to hear from someone who has not spoken yet”.
- Listen to what people say. Speaking up in a group takes courage. Being listened to with attention and respect increases the speaker’s sense of confidence and safety.
- Build the participants’ confidence by telling them that in terms of their own communities they are the “experts” and they need to share their expert knowledge with you and with each other.
- Ensure participants work with partners when the sessions tell them to do so. More people will be able to share their thoughts and ideas when they talk with a partner.

² Most of this material has been adapted from the IFRC (2009) publication, Behaviour change communication (BCC) for community-based volunteers: Trainer’s manual.

Presenting during the session:

- Know important points so you do not have to read them from the manual.
- Keep the presentation within the recommended time.
- Do not speak too quickly because the participants will not hear everything you say.
- Do not speak too slowly because they might get bored.
- Look at the participants as you give the information. Even if you read the information, look up occasionally so that people do not feel ignored.
- After an important point, pause for a moment to let the participants think about it.
- Watch people to see if they look confused. If so, stop and ask if they have any questions. Clarify any points, using different words, or ask if one of the other participants can help to clarify or explain.

Asking questions:

- Pause after asking a question to give participants time to think of their answers. Look around the group as you wait for someone to answer.
- If no one responds, ask the same question using different words and pause again, waiting for them to answer.
- When someone volunteers a response, do not be too quick to go on to the next question. Instead, ask if someone else has something to add to the first response.
- Listen to the responses for important points and acknowledge and thank each speaker.

Peer support:

- Actively involving participants to help in the training can be effective. It can provide an opportunity for a participant who has advanced content knowledge, and build team spirit among the participants.
- Learning from peers has been shown to be an effective way of enhancing learning. Peer learning can help the trainer to reach participants who, for a variety of reasons, have not responded to the traditional teaching process. It also helps build a climate of mutual support and collaboration.



Training outcomes and objectives

Expected outcomes

By the end of this training, participants will be:

- positive about their involvement in the survey process
- confident that they are well-prepared for the field survey operations (teamwork, segmentation, selecting households, locating assigned households, interviewing, data entry)
- confident that they are fully supported by the survey coordinator and his/her team, and in the field by the supervisory support and monitoring team

Objectives

By the end of this training, participants will be able to:

- state roles, responsibilities and expectations for their involvement in the survey
- understand the survey questionnaires
- explain the field operations and survey process
- carry out an effective interview, using the mobile phone to collect data
- carry out the survey in the field, following the correct procedures prescribed during the training



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Sample agenda

Time	Session number and description	Minutes
Day 1		
	Session 1 – Introductory session. Training expectations, objectives of training, agenda overview and ground rules. Overview of malaria control.	60
	Session 2 – Introduction to the survey: background and purpose, overview of survey. Optional PowerPoint presentation.	15
	Session 3 – An overview of the survey interview questionnaires and persons roster job aid, plus a review of bed nets	15
	Break	30
	Session 3 – An overview of the survey interview questionnaires and persons roster job aid, plus a review of bed nets (cont.)	60
	Session 3 – Review: a neighbour discussion	15
	Lunch – Mobile phone distribution and sign-out (instructions included in Session 4)	60
	Session 4 – Key terms in the questionnaires, plus an overview of malaria treatment and diagnosis	45
	Session 4 – Informed consent	30
	Session 4 – An introduction to the mobile phones and how data are entered. Optional PowerPoint presentation	45
	Break	30
	Session 4 – Conducting an interview: an exercise in pairs	75
	Day 1 review	15
	Meeting of training team³	
Day 2		
	Recap and review of Day 1 – Use of museum walk (see Trainer’s tools) to go over Day 1 topics.	40
	Session 5 – Interview questionnaire role-play	55
	Break	30
	Session 5 – Interview questionnaire role-play (cont.), key terms and demonstration of bed nets	50
	Session 6 – Interview tips and techniques	40
	Session 7 – Interviewing skills practice	35
	Lunch	60
	Session 7 – Interviewing skills practice (cont.)	60
	Break	30
	Session 8 – Fieldwork procedures: key steps and activities, and responsibilities of the field survey team	80
	Day 2 review	10
	Meeting of training team	

³ At the end of each day the training team will meet to reflect on the day’s sessions and preview the next day’s sessions.

Time	Session number and description	Minutes
Day 3		
	Day 2 recap	15
	Session 10 – Field practice instructions and allocation of teams/pairs	30
	Field practice – All trainees will take part in a field practice activity near the training site. They should each carry out at least one interview.	210
	Lunch	60
	Session 11 – Learning from the field practice	90
	Break	30
	Session 9 – Selecting households to be interviewed	70
	Day 3 review	5
	Meeting of training team	
Day 4		
	Day 3 recap	45
	Session 12 – Getting ready for the field ⁴ Part 1	45
	Break	30
	Session 12 – Getting ready for the field (cont.)	45
	Session 10 – Field practice instructions	15
	Lunch	60
	Session 10 – Field practice 2. The second field practice exercise, where each trainee will be expected to carry out at least two interviews.	210
	Meeting of training team	
Day 5		
	Day 4 recap and lessons learnt from field practice	90
	Break	30
	Session 13 – parallel session⁵ Supervisors only: Getting ready for the field Part 2 Interviewers: Topic-specific support	90
	Lunch	60
	Session 13 – parallel session⁵ Supervisors only: Getting ready for the field Part 2 (cont.) Interviewers: Topic-specific support	90
	Break	30
	Session 14 – Training summary and evaluation	60
	End of training	
Post-survey	Session 15 – Post survey reflection and debriefing	120-180

⁴ By this time, where supervisors have not been selected before the start of the training, an announcement should be made by the survey coordinator to inform which participants have been selected to be supervisors, and the composition of the field survey teams.

⁵ Parallel session. Trainer and co-trainer(s) should decide in advance how to divide the responsibility for the supervisor-only session and the session for the interviewers. The latter could include one-to-one or peer support if required.

Session 1 **Introductory session**

Overall goal	To provide an introduction to the supervisor/interviewer training and to identify the participants' expectations
Objectives	<p>By the end of this session, participants will have:</p> <ul style="list-style-type: none"> • introduced themselves • read and asked questions about the training objectives • become familiar with the training agenda • established ground rules for respectful behaviour • gained understanding of the malaria problem and the prevention and control programmes in the country/survey area
⌚	60 minutes
Methods	Welcome and presentation by invited guest (optional), small group activity, presentation by trainer, large group discussion
Materials/ preparation	<ol style="list-style-type: none"> 1. Blank flipchart paper, markers and tape for posting flipcharts, or alternatively a chalkboard and chalk. Watch or clock (needed for all training activities). 2. Index cards or sheets of paper (optional). 3. A laptop and LCD projector, and projection screen or white wall (optional). 4. Prepare your own brief welcome to the training. 5. Invite an appropriate representative from the Red Cross Red Crescent National Society, the Ministry of Health or another partner organization to open the training and make brief welcome remarks. 6. Invite a representative from the Ministry of Health or other knowledgeable person to prepare and deliver a brief overview (not longer than 10 to 15 minutes) about the malaria prevention and control programme (strategy, key interventions). 7. Review the agenda and make adjustments, as appropriate. Decide on the duration of the training and the number of field practice outings that will be incorporated. (The sample agenda includes two field practice outings.) Decide on start, breaks and end times for each day. Determine if the agenda needs to be adjusted to include time for prayers, if appropriate. Print one copy of the agenda for each participant and resource person. 8. Obtain blank name badges and markers for each participant, the trainer(s) and resource people. 9. Prepare a flipchart entitled "Training expectations". 10. Post a map of the survey area/country on the wall and have sticky notes or dots available (optional). 11. Write the list of objectives for training on a flipchart sheet. Variations: provide these on a handout "Training outcomes and objectives" incorporating the information in the agenda handout or prepare as PowerPoint slides.
Steps	<p>1. Welcome, introductions, icebreaker and expectations (30 minutes)</p> <p>1.1 The trainer needs to determine the welcome and introductory activities. Before the official start of the workshop, as participants enter the room and get settled in, greet the trainees warmly and introduce yourself as the training facilitator. Be polite, friendly and respectful. Thank any partners for their hospitality, support and logistical arrangements. Thank any invited guests for agreeing to participate and ask everyone if there are any special needs that they might have.</p>

- 1.2** Call the training workshop to order, tell the participants that we are ready to begin. Carry out the welcome activity. When the welcome activity is completed, greet the trainees and provide a brief introduction about yourself. Thank the host organization for their hospitality, support and logistical arrangements. If a prayer is normally said at the start of a workshop, lead the group through this: it can be done by the trainer, one of the participants or the invited speaker.

Ask each participant to introduce him/herself. Ask them to state information such as their name and with which organization they work. If they are a Red Cross Red Crescent volunteer, ask them to state where they work as a volunteer and how long they have been doing it. In addition, ask them to state where they are from and one interesting fact about their home town/village.

- 1.3** Icebreaker/expectations: ask the participants to break into small groups. Since this is the first time they have done this, you may need to direct participants into groups of three or four. Post the flipchart paper that reads "Training expectations". Say: *In each group, each person will introduce themselves, indicate which language(s) they can speak, and will also outline briefly their expectations for this training.* Tell each group to write down on the index card or sheet of paper provided the information from their group discussion because you will collect information from each group at the end of this activity. Ask each participant to use one of the coloured dots (or sticky notes), write their name on it and then stick it on the place where they live on the map that has been posted in the training room. On a flipchart beside the map, the trainer can note the languages spoken in the areas that the participants come from.

Variations: other icebreaker or gathering expectations activities can be carried out, depending on the preferences and experience of the trainer.

Tell the participants that they have 10 minutes for this activity.

- 1.4** After ten minutes, assemble the participants. Ask each group to report, stating the number and type of languages spoken, and the expectations of the group members. Limit the reporting time to two (2) minutes per group. If possible, write the participants' expectations as they are being mentioned, on the flipchart paper.

Comment on the expectations that have been shared. Assuming that many expectations that have been mentioned have been addressed by the training design, say: *Many of the expectations that have been mentioned will be covered in this training (identify which.) However, there are some expectations that were mentioned that will not be addressed in this training (identify which and state why they are not part of the training and whether or how this need might be addressed in the future.)* You could also ask participants to think about: *What are you expecting of yourself?*

- 1.5** Point out that each person in the room is a member of a household and that we will be speaking extensively about households in the coming days: about the definition of a household, how to select households for the survey and how to approach a household to obtain their consent to participate in the survey. We will also be speaking about language. The survey is planned using interviews. Each interview will be person-to-person, in the language(s) that have been chosen by the survey organizers. Tell the participants the language(s) in which the interviews will be conducted.

- 1.6** Explain that over the next days we will cover a great deal. Tell the participants that in a few minutes we will review the workshop objectives and the agenda, and that before we do this, there are a few administrative announcements to make.

2. Administrative and other announcements (5 minutes)

Say: *We want you to be able to give your full attention during this training workshop and realize that there may be some questions or issues that we first need to address so that we can all concentrate more easily. Therefore, it is beneficial to address some of those issues right away.* Topics to cover should include:

- breaks
- meals
- daily allowances
- accommodation
- who to contact for specific questions
- security
- location of sanitary facilities

Ask: ➤ *Are there any questions about the administrative arrangements?* Answer any questions and explain that additional questions relating to administrative issues (especially those concerning the field survey) will be covered during the training. Tell the participants that we will now turn to the objectives of the training and have a look at the agenda.

3. Training objectives and agenda (10 minutes)

3.1 Post the flipchart that lists the training outcomes and objectives and read them out loud. Variations: Distribute the handout “Training outcomes and objectives” or project the information on the PowerPoint slides.

Ask: ➤ *Are there any questions about the training outcomes and objectives?*

3.2 Compare the list of participant expectations to the training outcomes and objectives. Discuss differences and similarities.

3.3 Distribute the training agenda (or refer to it if already given to participants). Point out the major features of the training (duration of training, daily start and end times, the timing for the breaks and for lunch, the sessions covered each day, the day(s) that the field practice outings will take place). Point out that there are some sessions that will be for the supervisors only. Stress that it is expected that the participants will attend every day, all the sessions.

Ask: ➤ *Are there any questions about the content and timing of the training?*

Point out that at the end of each day the training team will meet to reflect on the day and preview the next day’s activities. Tell the participants that it would be appreciated if there could be a way for the trainees also to provide feedback to the training team: for example, identify a person to be the link from the trainees to the trainers for a brief meeting at the end of the day.

4. Ground rules for training (5 minutes)

4.1 Explain that the group needs to decide on some ground rules or group norms. This ensures that all participants have a common understanding of acceptable practices during the training. This will help to make the training as enjoyable and productive as possible. It is important that the rules are developed by the group and not by the trainer alone. The trainer could suggest a few to start, and then ask for suggestions from the participants. Write the suggestions on the flipchart as you agree on ground rules. Examples might include:

- attend all sessions punctually
- switch personal mobile phones to vibrate mode
- text messages answered only on breaks

- no laptop use
- full participation
- one conversation at a time
- respect one another

4.2 Thank the participants for their contributions and remind them to follow the ground rules that they have established. Tape the ground rules on the wall and leave them there for the duration of the training. Revisit the ground rules periodically during the training, especially if participants are not following them during training. If required, rules can be added as the training proceeds.

5. Overview of malaria control (10 minutes)

5.1 Introduce the invited guest and invite him/her to make a brief presentation about the problem of malaria in the country/study area and the main prevention and control activities.

5.2 Thank the presenter and tell the participants that over the course of this training week there will be plenty of opportunities to learn more about malaria and its prevention and control. And now, we will move to the next session and learn about the malaria survey in which we will all be involved.

Much of this was adapted from *Confronting Malaria in Our Community: Together We Can Defeat It!* (2005) Freedom from Hunger, which was used with permission in the IFRC publication *Malaria Prevention in the Community. Training guide for Red Cross Red Crescent supervisors and volunteers* (2009).



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HANDOUT Training outcomes and objectives

Expected outcomes

By the end of this training, participants will be:

- positive about their involvement in the survey process
- confident that they are well-prepared for the field survey operations (team-work, segmentation, selecting households, locating assigned households, interviewing, data input)
- confident that they are fully supported by the survey coordinator and his/her team, and in the field by the supervisory support and monitoring team

Training objectives for interviewers and supervisors

By the end of this training, participants will be able to:

- state roles, responsibilities and expectations for their involvement in the survey
- understand the survey questionnaires and the intent of the questions
- explain the field operations and survey process
- carry out an effective interview, using the mobile phone to collect data
- carry out the survey in the field, following the correct procedures as prescribed during the training

Session 2 Overview of the RAMP survey

Overall goal	To provide an overview of the survey
Objectives	By the end of this session, participants will be able to: <ul style="list-style-type: none"> • state the purpose and objectives of the survey • describe key information about the survey
	15 minutes
Methods	Presentation by trainer, large group discussion
Materials/ preparation	<ol style="list-style-type: none"> 1. Print one copy of the “Survey purpose and objectives” for each participant. 2. Review and adjust (as needed) the sample PowerPoint presentation “Overview of the RAMP survey” (optional).
Steps	<p>1. Overview of this RAMP survey</p> <p>1.1 Say: <i>During the survey, you will be either a supervisor or an interviewer, and over the days of this training we will all work hard to make sure that you leave the training with the skills and knowledge to be able to work successfully in the field. So, we will now look at a few details about this survey with which you will be involved.</i></p> <p>1.2 Provide information about the following to the participants:</p> <ul style="list-style-type: none"> – survey purpose and objectives – main features of the RAMP survey – team size and composition – key dates (for training, field survey, debriefings) – survey results <p>When addressing the survey purpose and objectives, distribute one copy of the handout “Survey purpose and objectives” to each participant, and review the contents. Note that the example given will need to be adapted to fit the purpose and objectives of your survey.</p> <p>The survey overview presentation can be done orally, drawing on the background information that has been used to plan the survey, or can be delivered using a PowerPoint presentation. The example given has been adapted from a presentation from the pilot RAMP survey that took place in Nigeria and will need to be further adapted to suit your survey.</p> <p>Ask:</p> <ul style="list-style-type: none"> ➤ <i>Are there any questions or comments about the survey purpose and objectives?</i> ➤ <i>Are there any questions about the survey?</i> <p>Explain that the participants have been chosen as candidates for the RAMP survey. If the supervisors have not yet been selected, and will be selected during the training, inform the participants about this and let them know how the decision will be made (e.g., based on observation, performance testing, and so on).</p> <p>Explain that you hope this brief activity has helped them understand some of the basics about the survey, and that over the coming days, they will learn much more about the survey and their roles and responsibilities in carrying it out. Tell the participants that in the next session, they will start to become familiar with the survey questionnaires.</p>

HANDOUT

Overview of the RAMP survey

Survey purpose

The purpose of this survey is to provide estimates for the ownership and usage of insecticide-treated nets (ITNs) in <the survey domain>. Information about indoor residual spraying (IRS) activity and anti-malarial treatment in children under five years of age will also be collected and analysed. The estimates of ITN ownership and use will evaluate whether the distribution of long-lasting insecticidal nets (LLINs) in <survey domain> achieved universal coverage with ITNs.

Survey objectives⁶

Vector control via ITN and IRS

- Estimate ITN ownership:
 - Proportion of households with one or more ITNs
 - Proportion of households with sufficient ITNs for all persons (with sufficient defined as one ITN per two persons)
 - Proportion of the population with access to an ITN within their household (with access defined as one ITN per two persons)
- Estimate ITN use:
 - Proportion of individuals who slept under an ITN the previous night
 - Proportion of children under five years of age who slept under an ITN the previous night
 - Proportion of existing ITNs used the previous night*
- To assess ITN ownership and usage by household socio-economic status*
- To measure the proportion of households with at least one ITN and/or sprayed by IRS in the past 12 months
- To measure the proportion of households that received IRS in the previous 12 months*

Case management

- To measure prompt access to effective treatment and use of diagnostics:
 - Proportion of children under five years old with fever in the last two weeks who had a finger or heel stick to test for malaria
 - Proportion of children under five years old with fever in the last two weeks for whom advice or treatment was sought
 - Proportion receiving first line treatment, among children under five years old with fever in the last two weeks, who received any anti-malarial drugs

Note: In each RAMP survey, the survey planners will develop their own set of statements about the survey purpose and the indicators. The RAMP malaria survey results bulletin reports on more indicators (e.g., regarding the age of ITNs, home visits made to households for discussion of malaria, source of information about malaria interventions, types of nets that households own, number of persons sleeping under each ITN) than those listed in the example.

⁶ Three malaria interventions: bed nets, treatment for fever in under-fives and IRS, are examined in the RAMP malaria survey. The indicators shown are a mix of primary indicators (except the one for assessing ITN ownership and usage by household socio-economic status) taken from the RBM Malaria Indicator Survey model from 2012, and secondary indicators (indicated by *).

HANDOUT*

Slide 1



Slide 2

Survey purpose and objectives

- See the handout

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Slide 3

RAMP survey
Improve the flow of health information

- Developed by IFRC
- The aim is to provide a way to do a survey so that Red Cross Red Crescent National Societies, governments and NGOs can obtain - in a short time- valid data representative of the population
 - at reduced cost
 - with limited external technical assistance
 - with high standards of survey design and quality

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Slide 4

* This has been prepared as a PowerPoint presentation, but may also be printed as a handout for the participants (format and number of slides per page to be determined by the trainer). The PowerPoint version of the slides may be downloaded from the RAMP website (www.ifrc.org/ramp).

Collection and transfer of data

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Slide 5



RAMP survey: features

- Standardized questionnaires (core and "add-on")
- Survey administered using mobile phones
- Innovative field procedures (rapid mapping, segmentation, survey tools) to support a high-quality survey
- Rapid reporting of results

Slide 6



Initial focus of the RAMP survey: malaria

- Pilot RAMP surveys have been designed to evaluate malaria programmes
- Core questionnaires are based on alignment with Malaria Indicator Survey and measure core Roll Back Malaria (RBM)/WHO indicators
- The tool is relevant to many other programming areas, e.g. water and sanitation

Slide 7



**RAMP survey:
piloting in Nigeria**

- Carried out in Cross River State
- In 10 of the 18 Local Government Areas (LGAs)
- In LGAs where Nigerian Red Cross Society had carried out a door-to-door distribution and hang-up campaign of LLINs (January-June 2011)
- In 30 clusters that were randomly selected
- In households that were randomly selected (10 households per cluster)

Slide 8



Who carried out the survey?

- 6 field teams
 - 2 interviewers per team
 - 1 field supervisor per team
- ▶ Survey supervisory and monitoring team
- ▶ Red Cross volunteers/guides
- ▶ Drivers

Slide 9



Weeks not months

- Training (5 days, e.g. June 20-24)
- Field survey (5 days, e.g. June 27-July 1)
- Debriefing of survey teams (1 day e.g. July 2)
- Reporting of results and debriefing to stakeholders (1 day e.g. July 5)

Slide 10



Survey results

- Generate rapid results that will be reliable for the whole survey domain
- Help to evaluate and improve the malaria programme

Slide 11



Working with mobile phones in the field

- The system does *not* require an internet connection to input data into the phone
- The questionnaires are stored directly into the phone
- Following data collection, the teams can send data to the server once they have internet connectivity

Slide 12



Data monitoring

- Real time data monitoring
- Data quality assurance
- Eliminates paper-to- electronic database transfer
- Allows for preliminary analysis even before the data collection is complete



Session 3 The survey questionnaires

Overall goal	To gain knowledge about the questionnaires
Objectives	By the end of this session, the trainees will be able to: <ul style="list-style-type: none"> • describe the basic structure of the questionnaires and the order of their administration • outline the content of the questionnaires
	90 minutes
Methods	Interactive presentations by trainers, individual exercise, large group discussion, neighbour discussion
Materials/ preparation	<ol style="list-style-type: none"> 1. Print one copy of the “RAMP malaria survey: questionnaire paper training tool” for each participant. 2. Print one copy of the job aid “Persons roster and who slept under which net last night” for each participant. (Note that more copies will be needed for later sessions.) 3. Write “Types of bed nets” on a flipchart. 4. Print one copy of the handout “Interview questionnaires: comments and questions” for each participant. 5. Label a flipchart “Questions and concerns”. 6. Prepare sufficient blank cards or sticky notes for all participants.
Steps	<p>1. Introduction</p> <p>1.1 Begin this session by telling the participants that we will now be introduced to the survey questionnaires that will be used for this survey, and the use of mobile phones in surveys.</p> <p>1.2 Explain to the participants that traditionally, paper questionnaires have been used in most surveys in the field. The field team leaves for the field with a large amount of paper, often boxes of questionnaires. The interviewer fills out these questionnaires in the field, and the field supervisor checks the completed forms. The completed forms are brought back to a central site, and the data are entered into a computer, processed and analysed. Often, weeks or even months can go by before the survey results are reported.</p> <p>1.3 Ask: ➤ <i>Who has been involved in carrying out interviews using a paper-based questionnaire? Did you ever see the survey results?</i></p> <p>1.4 A mobile phone is also called a digital device, and more and more, digital devices are being used in field surveys to record the data collected during survey interviews. Hold up a mobile phone and say: <i>In this survey, the paper forms have been replaced by this device, a cell phone, or mobile phone. How many of you have used a mobile phone? Is it difficult to use a mobile phone?</i> Ask the participants the reasons they have used a mobile phone. Expected responses are: for making and receiving phone calls, for sending text messages, for connecting to the internet, as a clock. Ask if anyone has used a mobile phone for data entry and surveys.</p>

- 1.5** In this survey, the survey questionnaires have already been designed and they are “stored” on the mobile phone. Each of you will be given a mobile phone to use during this survey, and you will use it to enter and capture the data collected during the interviews that you will carry out. This technology reduces the time it takes to clean and download data and analyse the survey results. Unlike with paper and clipboard, the collected data can even be instantly transferred from the mobile phone to a desktop computer for analysis. You, as interviewers, do not need computer skills to do your job of interviewing. You *will*, however, need to know how to use the phone for the survey.
- 1.6** Our aim is that by the end of the day, every one of you will have started to get familiar with the mobile phone that will be used in the survey and gained some confidence in using the mobile phone to enter data. And, by the end of the training, every one of you will be fully able to use the mobile phone with confidence to administer the questionnaires in the field and carry out effective interviews.

2. Introducing the survey interview questionnaires (75 minutes)

- 2.1** Tell the participants that the main tools in this survey are the survey questionnaires. The job of the interviewer – *their* job – will be to “administer” the questionnaires in the field, that is, to carry out a household interview involving asking people questions.

- 2.2** One of their tasks during training is to become very familiar with the questionnaires.

Explain that we will now have the chance to see the questionnaires. They are standard survey questionnaires to measure LLIN ownership, hanging rate and usage. Questions about IRS (indoor residual spraying where walls are sprayed with insecticide) and treatment of fever in children under five years of age are also included.

- 2.3** Explain that the questionnaires have been uploaded or saved onto all the mobile phones, and for the survey you will enter data using the phone. Right now though, we will first see the questionnaires in a paper version. What are the questions that will be asked by you, the interviewers?
- 2.4** Distribute a copy of the “RAMP survey: questionnaire paper training tool” and the job aid “Persons roster and who slept under which net last night” to each person. Tell all participants that they will now have a few minutes on their own to start to become familiar with the survey questionnaires and a related job aid.
- 2.5** Say: *I will now give you 10 minutes to look over the questionnaires and the job aid on your own. In this short time, I do not expect that you will memorize the questions or become really familiar with the questionnaires. Rather, the aim is that you will begin to be comfortable with the questionnaires and the job aid and begin to build your understanding of these survey tools.*

Walk around the room and ensure that all participants are moving steadily through the questionnaires and are not getting fixated on small details.

After 10 minutes, call the group back to the plenary. Ask:

- ➔ How many questionnaires are in this survey?
- ➔ What are they called?
- ➔ Is there an interviewer job aid in this survey? What is it called?
- ➔ Is there anything that struck you or surprised you when you examined these questionnaires or the job aid?

- 2.6** Explain that you will now lead the group through a review of all three questionnaires and the job aid. Please have in front of you the copy of the “RAMP survey: questionnaire paper training tool” and the job aid. We will move through the questionnaires together with the opportunity to discuss each questionnaire, question-by-question. The aim is to build an understanding of the basic components of the survey instrument, and the basic structure and breadth of the questionnaires. Stress that each person must be very familiar with the questionnaires. You must understand each of the questions in the questionnaires and their intent, i.e. how the data are used, and you must understand the possible responses that are given for each question and know what an adequate response is to each question. It is important that you understand what an adequate response is because without this knowledge you might accept an inadequate answer.

Distribute the handout “Interview questionnaires: comments and questions” and encourage the participants to use this form to write any concerns or questions they have about the questionnaires and the job aid for the household interviews. This form will not be collected and is meant to help them capture their thoughts on paper. They may be asked to go back to this form at the end of the training to see if any doubts or worries have been addressed by the training.

- 2.7** Begin the review of the questionnaires and the job aid, doing it in this order: household questionnaire; the job aid “Persons roster and who slept under which net last night”; persons roster; net roster. Follow this review with the information about types of bed nets in use in the locality.

First, point out only the higher level information, such as:

- there are three questionnaires (or modules) in this survey: the household questionnaire, the persons roster questionnaire, and the net roster questionnaire
- there is one job aid that is part of administering the survey, and it is called the “Persons roster and who slept under which net last” night
- for each household that you interview, each of these must be completed: that is, an interview consists of you asking the questions on each of these questionnaires/modules and completing the job aid. (There is an exception and we will come to that later.)

Some basics that are common to all three questionnaires are provided below. This information can be shared when going over each of the questionnaires, and can also be used when carrying out a review of the content of this session.

- There are labels in each module. These labels are a kind of a heading, and are not meant to be asked or spoken out loud during the interview.
- There are “questions” for the interviewer only. The interviewer should not read this information out loud to the respondent.
- The interviewer name needs to appear at the beginning of each questionnaire. For the household questionnaire, the name is entered by the interviewer him/herself. The name will be repeated automatically in the other two.
- Each questionnaire asks for the cluster number and the household number. The cluster number will be assigned to each survey team, and the household number will be determined by each team, while in the field.
- The responses are either text or are completed by checking one of the possible response options.
- There are “skips” shown. These skips are based on how the respondent answers a question (or on the responses to several questions). A skip can mean that the interviewer jumps to a question, “skipping over” the next question or questions because they are not relevant for this household.
- When asking a question, all interviewers should provide the same answer if asked for clarification. The interviewer needs to ensure understanding of the questions by the respondent and not influence his/her response.
- Depending on the questionnaire, at the end of it, the interviewer can either proceed by closing this portion of the interview, or can add a new record.

Tell the group that we will now start with an examination of the household questionnaire. In carrying out the review, move through the questionnaire, question-by-question. Allow the participants to ask questions and clarify items as they arise. There may be questions that you can answer immediately, while for others you might need to indicate that the topic will be discussed in much more detail later in the training. The content on malaria diagnosis and treatment and on bed nets can be generally reviewed in this session, with more details to follow (see session 4). There are different ways that you can facilitate this activity. You can ask a participant to read each question and the responses, you can ask different participants to do this, or you can run through the questionnaires yourself.

Some basics about each of the questionnaires and the related job aid are provided below.

For the **household questionnaire:**

- The questionnaire is divided into sections. These are: the questions leading to consent obtained, questions about the location of the household, bed net questions, indoor residual spraying (IRS) questions, and household characteristics questions.
- For each section, there are a number of questions for which data will need to be entered.
- There are over 50 questions in the household questionnaire.
- At the beginning, the interviewer's name needs to be entered. Then, the name will be repeated automatically in the other questionnaires, the persons roster and the net roster.
- Depending on the response to a question, there may be a skip to another question or section of the questionnaire.
- If consent is not given then you will automatically skip to the very last question of this questionnaire and your time in this household is over. You will then proceed to the next household.
- If you find that no one is at home in the household that you have been assigned to interview (and you have tried twice) you must enter this information into the mobile phone (for the question "Interviewer was able to interview member of this household?" enter "No, not interviewed"). There will not be an interview for that household.

Job aid (**Persons roster and who slept under which net last night**):

- There are two parts to this job aid, Part A and Part B. Part A is designed to record the names of all the people that slept in the household last night. This form *must* be filled out before you start the persons roster questionnaire. This is essential in order to be able to enter the required data in the mobile phone for the persons roster.
- Only the name of each person (and *not* their ages too) is entered on this job aid.
- Part B (the second part of the job aid) is used to help complete the net roster. The information you record can serve as a memory aid when you are observing the nets in a household and/or completing the net roster. It helps you to list all nets and ensure that you do not record a person sleeping under more than one net owned by the household.
- These job aids will be collected from each interviewer for each household interviewed in this survey.

For the **persons roster questionnaire:**

- This questionnaire must be completed for each person that slept in the household last night.
- To complete this questionnaire, the interviewer must have already completed Part A of the job aid. The line number of each person that slept in the household last night is obtained from the job aid.
- Age must be given as years (not months).
- There are skip patterns. The questions about the diagnosis and treatment of fever are only asked if a child is under five years of age and has had fever in the last two weeks.

- It will be important that the interviewer understands the kinds of anti-malarial drugs that are used in the survey area (especially artemisinin-containing combination therapies (ACTs)). There are also medicines that might be given to treat fever that are not anti-malarial drugs. There will be more information about this subject (and a job aid) provided later in the training.
- This questionnaire is “closed” only when data have been collected for every single person that slept in this household last night.

For the **net roster questionnaire:**

- This questionnaire is not to be completed if there are no bed nets owned by the household. Determine this information before opening this questionnaire.
- It is essential that the interviewer knows about the ways that bed nets have been distributed (e.g., in a mass distribution campaign, through the health facility, and so on), and what are the common sources of bed nets. The interviewers need to know about the types of bed nets that can be owned by a household, and how to identify the brand(s) used. Samples of bed nets used in the survey area will be available later in the training.
- To complete this questionnaire, the interviewer must have already completed the job aid. Part B provides the information about the nets in the household, and Part A provides the line number of the person(s) that slept under each net.
- A person can only sleep under one net the previous night.
- This questionnaire is “closed” only when data have been collected for every single net that is owned by the household.
- After the completion of the net roster, the interview in that household is complete and the interviewer can proceed to the next household.

For **types of bed nets**

Say: In this survey we will be collecting data to measure the ownership and usage of insecticide-treated nets (ITNs) in the households that we survey. The questions in the net roster will enable us to do this.

Ask if anyone can tell us which different types of nets are used in the community. Wait for a few responses. Post the prepared list of “Types of bed nets” and compare it to the contributions made by the participants, highlighting any information that was not mentioned by the participants.

Types of bed nets

Insecticide-treated net (ITN):

- LLIN (long-lasting insecticide-treated nets). A factory-treated net. Does NOT require any further treatment. Can be effective for three years or more. Different brands are available.
- Pre-treated bed net. Previously treated with insecticide. Requires further treatment after six to twelve months.

Untreated bed net:

- Nets that have never been treated with insecticide (untreated net).
- Nets previously treated with insecticide that may have lost their strength due to washing or because they were treated more than six to twelve months ago.

You can point out that nets that were treated more than six to twelve months ago can be retreated with insecticide to improve the protection they provide. In addition, nets that have never been treated with insecticide can be treated to improve the protection they provide.

Provide information about the mass campaign(s) that have been held to distribute LLINs in the study area, and the distribution of bed nets through the routine health services. Point out other sources of bed nets that may be relevant to the study area (e.g., pharmacies, the market) and strategies that are being used to distribute

LLINs (e.g., targeted distribution by non-governmental organizations, and so on). Ask if anyone has questions about the types of nets, or that section of the net roster that addresses type or brand of net. Respond to questions and clarify information. Point out that we will arrange to have samples of some of these nets here later in the training. You will be able to see them and the packaging that the nets come in.

- 2.8 Thank the participants for their attention on this activity that has been carried out with the full group. Tell them that they will now be given some more time to study and become more familiar with the questionnaires and the job aid. This activity will be carried out with their neighbour.

3. Review: neighbour discussion (15 minutes)

- 3.1 Tell all participants that they will now be given some time to think about and discuss the concepts and information about the survey and the questionnaires that have been presented so far. Ask the trainees to turn to their neighbour and “pair and share” with him/her. Tell the pairs that they should refer to the handout “Interview questionnaires: comments and questions” on which they may have already made some notes. Ask them to write any questions or concerns that they have on the card (or sticky note) that is now being circulated to each person/pair.
- 3.2 When the time is up, randomly call on a few individuals and ask them to share their ideas and questions with the group. Ask if there were any areas of misunderstanding, or a need for more information. Collect all the cards (or sticky notes). Review the comments made on these cards. The cards (or notes) can be posted on the “Questions and concerns” flipchart and placed where the chart is visible to all participants. Ensure that by the end of the day you address all questions and concerns.
- 3.3 Thank everyone for their participation in this session and explain that there will be ample time during the training to gain greater knowledge about the contents of the questionnaire and how to administer the questionnaires and enter data using the mobile phone. Coming up next, we will do some more work to increase understanding of the questionnaires and some of the terms used in them.



RAMP malaria survey: questionnaire paper training tool⁷

1. Household questionnaire

No.	Variable	Response scale
1	Household questionnaire for malaria survey	
2.	Interviewer name	<input type="text"/>
3.	CLUSTER and HOUSEHOLD NUMBER questions follow next	
4.	Cluster number	<input type="text"/> <input type="text"/>
5.	Household number	<input type="text"/> <input type="text"/>
6.	Interviewer was able to interview member of this household?	<input type="radio"/> Yes interviewed <input type="radio"/> No, not interviewed (Skip to Q. 55)
7.	Consent obtained?	<input type="radio"/> Yes <input type="radio"/> No (Skip to Q. 55)
8	Name of head of household	<input type="text"/>
9	Household in a rural or urban area? <i>(NOTE: To be completed by interviewer, not by asking respondent)</i>	<input type="radio"/> Rural <input type="radio"/> Urban
10	How many kilometres is your household from the nearest government, NGO, or mission health facility or hospital? (98=do not know). If less than 1 km, put "1".	<input type="text"/> <input type="text"/>
11	How many minutes does it take to walk to the nearest health facility?	<input type="text"/> <input type="text"/> <input type="text"/>
12	MOSQUITO BED NET questions follow next	
13	Number of people of all ages who slept in this household last night? <i>(Do NOT include usual members of this household who slept somewhere else last night)</i>	<input type="text"/> <input type="text"/>
14	Last night, how many sleeping spaces were there (both inside and outside if someone slept outside)? <i>(Sleeping space defined as a place where people sleep that could be covered by a single net)</i>	<input type="text"/> <input type="text"/>
15	Does your household have any mosquito nets that can be used while sleeping?	<input type="radio"/> Yes <input type="radio"/> No (Skip to Q. 17)
16	How many mosquito nets does your household have? (Enter "0" if none)	<input type="text"/> <input type="text"/>
17	Has a community volunteer visited this household in the last 6 months to talk about malaria or mosquito nets?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Do not know

⁷ August 2012 version. See the RAMP website (www.ifrc.org/ramp) for updates.

No.	Variable	Response scale
18	What is your greatest source of information on the use of mosquito nets?	<input type="radio"/> Radio <input type="radio"/> Health centre staff <input type="radio"/> Community- based volunteer <input type="radio"/> Community leader <input type="radio"/> Neighbour <input type="radio"/> Relative <input type="radio"/> Television <input type="radio"/> Other <input type="radio"/> No information
19	Indoor Residual Spraying (IRS) questions follow next	
20	At any time in the past 12 months, has anyone sprayed the interior walls of your dwelling against mosquitoes?	<input type="radio"/> Yes <input type="radio"/> No (Skip to Q.22) <input type="radio"/> Do not know* (Skip to Q.22)
21	Who sprayed the dwelling?	<input type="radio"/> Government worker or programme <input type="radio"/> Private company <input type="radio"/> Non-governmental organization (NGO) <input type="radio"/> Other <input type="radio"/> Do not know
22	HOUSEHOLD CHARACTERISTICS questions follow next	
23	What is the main household source of drinking water?	<input type="radio"/> Piped into dwelling <input type="radio"/> Piped into yard or plot <input type="radio"/> Piped public tap or standpipe <input type="radio"/> Tube well or borehole <input type="radio"/> Dug well protected <input type="radio"/> Dug well unprotected <input type="radio"/> Rainwater <input type="radio"/> Tanker truck <input type="radio"/> Cart with small tank <input type="radio"/> Surface water (lake pond etc.) <input type="radio"/> Bottled water <input type="radio"/> Other
24	Where is that water source located?	<input type="radio"/> In own dwelling <input type="radio"/> In own yard or plot <input type="radio"/> Elsewhere
25	How long (in minutes) does it take to go there, get water, and come back?	<input type="text"/> <input type="text"/>
26	What kind of toilet facility do members of your household usually use?	<input type="radio"/> FLUSH or POUR FLUSH to piped sewer <input type="radio"/> FLUSH or POUR FLUSH to septic tank <input type="radio"/> FLUSH or POUR FLUSH to pit latrine <input type="radio"/> FLUSH or POUR FLUSH to somewhere else <input type="radio"/> FLUSH do not know where <input type="radio"/> PIT ventilated improved <input type="radio"/> PIT with slab <input type="radio"/> PIT without slab or open pit <input type="radio"/> COMPOSTING toilet <input type="radio"/> BUCKET toilet <input type="radio"/> HANGING toilet or latrine <input type="radio"/> NO TOILET bush or field <input type="radio"/> OTHER
27	Do you share this toilet facility with other households?	<input type="radio"/> Yes <input type="radio"/> No (Skip to Q.29)

No.	Variable	Response scale
28	How many households use this toilet facility?	<input type="checkbox"/> <input type="checkbox"/>
29	Does your household have electricity?	<input type="radio"/> Yes <input type="radio"/> No
30	Radio?	<input type="radio"/> Yes <input type="radio"/> No
31	Television?	<input type="radio"/> Yes <input type="radio"/> No
32	Mobile phone?	<input type="radio"/> Yes <input type="radio"/> No
33.	Non-mobile phone?	<input type="radio"/> Yes <input type="radio"/> No
34	Refrigerator?	<input type="radio"/> Yes <input type="radio"/> No
35	What is the main kind of cooking fuel used in your household?	<input type="radio"/> Electricity <input type="radio"/> LPG <input type="radio"/> Natural gas <input type="radio"/> Biogas <input type="radio"/> Kerosene <input type="radio"/> Coal lignite <input type="radio"/> Charcoal <input type="radio"/> Wood <input type="radio"/> Straw shrub grass <input type="radio"/> Agricultural crop <input type="radio"/> Animal dung <input type="radio"/> No food cooked in household <input type="radio"/> Other
36	What is the main material of flooring in your household? (Interviewer may choose to observe)	<input type="radio"/> Earth or sand <input type="radio"/> Dung <input type="radio"/> Wood planks <input type="radio"/> Palm or bamboo <input type="radio"/> Parquet or polished wood <input type="radio"/> Vinyl or asphalt strips <input type="radio"/> Ceramic tiles <input type="radio"/> Cement <input type="radio"/> Carpet <input type="radio"/> OTHER
37	Main material of roof? (Interviewer may choose to observe)	<input type="radio"/> NATURAL no roof <input type="radio"/> NATURAL thatch or palm leaf <input type="radio"/> NATURAL sod <input type="radio"/> RUDIMENTARY rustic mat <input type="radio"/> RUDIMENTARY palm or bamboo <input type="radio"/> RUDIMENTARY wood planks <input type="radio"/> RUDIMENTARY cardboard <input type="radio"/> FINISHED metal <input type="radio"/> FINISHED wood <input type="radio"/> FINISHED calamine or cement fiber <input type="radio"/> FINISHED ceramic tiles <input type="radio"/> FINISHED cement <input type="radio"/> FINISHED roofing shingles <input type="radio"/> OTHER

No.	Variable	Response scale
38	Main material of exterior walls? (Interviewer may choose to observe)	<input type="radio"/> NATURAL no walls <input type="radio"/> NATURAL cane palm or trunks <input type="radio"/> NATURAL dirt <input type="radio"/> RUDIMENTARY bamboo with mud <input type="radio"/> RUDIMENTARY stone with mud <input type="radio"/> RUDIMENTARY uncovered adobe <input type="radio"/> RUDIMENTARY plywood <input type="radio"/> RUDIMENTARY cardboard <input type="radio"/> RUDIMENTARY reused wood <input type="radio"/> FINISHED cement <input type="radio"/> FINISHED stone with lime or cement <input type="radio"/> FINISHED bricks <input type="radio"/> FINISHED cement blocks <input type="radio"/> FINISHED covered adobe <input type="radio"/> FINISHED wood planks or shingles <input type="radio"/> OTHER
39	Watch?	<input type="radio"/> Yes <input type="radio"/> No
40	Bicycle	<input type="radio"/> Yes <input type="radio"/> No
41	Motorcycle or scooter?	<input type="radio"/> Yes <input type="radio"/> No
42	Animal-drawn cart?	<input type="radio"/> Yes <input type="radio"/> No
43	Car or truck?	<input type="radio"/> Yes <input type="radio"/> No
44	Boat with motor?	<input type="radio"/> Yes <input type="radio"/> No
45	Does any member of this household own any agricultural land?	<input type="radio"/> Yes <input type="radio"/> No (Skip to Q. 47)
46	How many hectares of agricultural land do members of this household own? (IF 950 or more, enter "950")	<input type="text"/> <input type="text"/> <input type="text"/>
47	Does this household own any livestock, herds, other farm animals, or poultry?	<input type="radio"/> Yes <input type="radio"/> No (Skip to Q. 54)
48	How many cattle? (Enter "0" if none)	<input type="text"/> <input type="text"/> <input type="text"/>
49	How many milk cows or bulls? (Enter "0" if none)	<input type="text"/> <input type="text"/> <input type="text"/>
50	How many horses, donkeys, mules? (Enter "0" if none)	<input type="text"/> <input type="text"/> <input type="text"/>
51	How many goats? (Enter "0" if none)	<input type="text"/> <input type="text"/> <input type="text"/>
52	How many sheep? (Enter "0" if none)	<input type="text"/> <input type="text"/> <input type="text"/>
53	How many chickens (Enter "0" if none)	<input type="text"/> <input type="text"/> <input type="text"/>
54	Does any member of this household have a bank account?	<input type="radio"/> Yes <input type="radio"/> No
55	This portion of the interview is complete. Close this questionnaire by clicking "Finish for now" on the next screen. If consent was NOT obtained, proceed to the next household. If consent was obtained, proceed to the "Persons roster" questionnaire.	

2. Persons roster questionnaire

No.	Variable	Response scale
1	PERSONS ROSTER. Ask about the persons who slept here last night, including non-family members. Start with the head of HH or oldest person. Do NOT include usual members of the HH if they DID NOT sleep here last night.	
2	Interviewer name <i>(automatically entered)</i>	<input type="checkbox"/>
3	Cluster number <i>(same as in Household questionnaire)</i>	<input type="checkbox"/> <input type="checkbox"/>
4	Household number <i>(same as in Household questionnaire)</i>	<input type="checkbox"/> <input type="checkbox"/>
5	Name of the person	<input type="checkbox"/>
6	Line number of the person in the household <i>(Obtain this from paper Persons Roster, column 1)</i>	<input type="checkbox"/> <input type="checkbox"/>
7	Gender	<input type="radio"/> Male <input type="radio"/> Female
8	Age in YEARS? Mark zero (0) if less than 12 months old. <i>(Estimate if they do not know, especially for adults)</i>	<input type="checkbox"/> <input type="checkbox"/> (IF ≥5 years skip to Q. 23)
9	[ASK Q9-22 OF CHILDREN <5 YEARS OLD ONLY] Has (NAME) been ill with fever in the last two weeks?	<input type="radio"/> Yes <input type="radio"/> No (Skip to Q. 23) <input type="radio"/> Do not know* (Skip to Q. 23)
10	(IF FEVER), at any time during the illness, did (NAME) have blood taken from his/her finger or heel for testing?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Do not know
11	(IF FEVER), did you seek advice or treatment for the illness from any source?	<input type="radio"/> Yes <input type="radio"/> No (Skip to Q. 16) <input type="radio"/> Do not know* (Skip to Q. 16)
12	(IF ADVICE OR TREATMENT), how many different sources did you go to for advice or treatment?	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4
13	(IF ADVICE OR TREATMENT), where did you seek advice or treatment FIRST?	<input type="radio"/> Public government hospital <input type="radio"/> Public government health center <input type="radio"/> Public mobile clinic <input type="radio"/> Public fieldworker <input type="radio"/> Public other <input type="radio"/> Private hospital <input type="radio"/> Private pharmacy <input type="radio"/> Private doctor <input type="radio"/> Private mobile clinic <input type="radio"/> Private field workers <input type="radio"/> Private other <input type="radio"/> Other shop <input type="radio"/> Other traditional practitioner <input type="radio"/> Other market

No.	Variable	Response scale
14	(IF ADVICE OR TREATMENT MORE THAN ONE PLACE), where did you seek advice or treatment SECOND?	<input type="radio"/> Public government hospital <input type="radio"/> Public government health center <input type="radio"/> Public mobile clinic <input type="radio"/> Public fieldworker <input type="radio"/> Public other <input type="radio"/> Private hospital <input type="radio"/> Private pharmacy <input type="radio"/> Private doctor <input type="radio"/> Private mobile clinic <input type="radio"/> Private field workers <input type="radio"/> Private other <input type="radio"/> Other shop <input type="radio"/> Other traditional practitioner <input type="radio"/> Other market
15	(IF ADVICE OR TREATMENT MORE THAN TWO PLACES), where did you seek advice or treatment THIRD?	<input type="radio"/> Public government hospital <input type="radio"/> Public government health center <input type="radio"/> Public mobile clinic <input type="radio"/> Public fieldworker <input type="radio"/> Public other <input type="radio"/> Private hospital <input type="radio"/> Private pharmacy <input type="radio"/> Private doctor <input type="radio"/> Private mobile clinic <input type="radio"/> Private field workers <input type="radio"/> Private other <input type="radio"/> Other shop <input type="radio"/> Other traditional practitioner <input type="radio"/> Other market
16	At any time during the illness, did (NAME) take any drugs for the illness?	<input type="radio"/> Yes <input type="radio"/> No (Skip to Q. 23) <input type="radio"/> Do not know* (Skip to Q. 23)
17	(IF TOOK DRUG), what drugs did (NAME) take (FIRST DRUG, UP TO THREE DRUGS)?	<input type="radio"/> Mal SP Fansidar <input type="radio"/> Mal Chloroquine <input type="radio"/> Mal Amodiquine <input type="radio"/> Mal Quinine <input type="radio"/> Mal ACT <input type="radio"/> Mal Other <input type="radio"/> Antibiotic pill or syrup <input type="radio"/> Antibiotic injection <input type="radio"/> Other Aspirin <input type="radio"/> Other Acetaminophen <input type="radio"/> Other Ibuprofen <input type="radio"/> Other <input type="radio"/> Do not know
18	(IF TOOK FIRST DRUG), how long after the fever started did (NAME) first take the drug?	<input type="radio"/> Same day <input type="radio"/> Next day <input type="radio"/> Two days after fever <input type="radio"/> Three or more days after fever <input type="radio"/> Do not know

No.	Variable	Response scale
19	(IF TOOK DRUG), what drugs did (NAME) take (SECOND DRUG, UP TO THREE DRUGS)?	<input type="radio"/> Mal SP Fansidar <input type="radio"/> Mal Chloroquine <input type="radio"/> Mal Amodiquine <input type="radio"/> Mal Quinine <input type="radio"/> Mal ACT <input type="radio"/> Mal Other <input type="radio"/> Antibiotic pill or syrup <input type="radio"/> Antibiotic injection <input type="radio"/> Other Aspirin <input type="radio"/> Other Acetaminophen <input type="radio"/> Other Ibuprofen <input type="radio"/> Other <input type="radio"/> Do not know
20	(IF TOOK A SECOND DRUG), how long after the fever started did (NAME) take the drug?	<input type="radio"/> Same day <input type="radio"/> Next day <input type="radio"/> Two days after fever <input type="radio"/> Three or more days after fever <input type="radio"/> Do not know
21	(IF TOOK DRUG), what drugs did (NAME) take (THIRD DRUG)?	<input type="radio"/> Mal SP Fansidar <input type="radio"/> Mal Chloroquine <input type="radio"/> Mal Amodiquine <input type="radio"/> Mal Quinine <input type="radio"/> Mal ACT <input type="radio"/> Mal Other <input type="radio"/> Antibiotic pill or syrup <input type="radio"/> Antibiotic injection <input type="radio"/> Other Aspirin <input type="radio"/> Other Acetaminophen <input type="radio"/> Other Ibuprofen <input type="radio"/> Other <input type="radio"/> Do not know
22	(IF TOOK A THIRD DRUG), how long after the fever started did (NAME) take the drug?	<input type="radio"/> Same day <input type="radio"/> Next day <input type="radio"/> Two days after fever <input type="radio"/> Three or more days after fever <input type="radio"/> Do not know
23	IF there IS another person who slept here last night click "Add new record" on the next screen. IF NO MORE people, close this questionnaire by clicking option "Finish for now" on the next screen. Then proceed to "Net Roster" questionnaire.	

3. Net roster

No.	Variable	Response scale
1	NET ROSTER. I would like to ask you about each mosquito bed net that you have in the household (includes all nets that were owned and present in the household last night. Interviewer must enter a new record for each net.)	
2.	Interviewer name (automatically entered)	<input type="checkbox"/>
3	Cluster number (same as in Household questionnaire)	<input type="checkbox"/> <input type="checkbox"/>
4	Household number (same as in Household questionnaire)	<input type="checkbox"/> <input type="checkbox"/>
5	Net number, INTERVIEWER ONLY: What net are you collecting information about? If the first net PUT number 1, if the second net PUT number 2, etc. (use consecutive numbers)	<input type="checkbox"/> <input type="checkbox"/>
6	INTERVIEWER ONLY: Ask if you can see this net. Did you observe the net?	<input type="radio"/> Yes <input type="radio"/> No
7	Was this net hung last night? (Look for evidence of hanging and observe or ask if the net was hanging)	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Do not know
8	How many months ago did your household get the mosquito net? (RECORD IN MONTHS. Put "36" for 3 yrs, "48" for 4 yrs, and "60" for >5yrs. 98=NOT SURE)	<input type="checkbox"/> <input type="checkbox"/>
9	From where did you obtain this net? ⁸	<input type="radio"/> Mass campaign 20XX <input type="radio"/> Market/Retail shop <input type="radio"/> Health facility <input type="radio"/> Pharmacy <input type="radio"/> Friend/Relative <input type="radio"/> Other
10	Brand/type of the net? (Observe or ask for the brand/type of mosquito net. If the brand is unknown, and you cannot observe the net, show pictures of typical net types/brands to respondent)	<input type="radio"/> LLIN-Brand A <input type="radio"/> LLIN-Brand B <input type="radio"/> LLIN-Brand C <input type="radio"/> Other LLIN or DK LLIN brand <input type="radio"/> Other non-LLIN brand <input type="radio"/> Do not know brand
11.	Since you got the net, was it ever soaked or dipped in a liquid to kill or repel mosquitoes?	<input type="radio"/> Yes <input type="radio"/> No (Skip to Q. 13) <input type="radio"/> Do not know (Skip to Q. 13)
12.	How many months ago was the net last soaked or dipped? (Enter "99" for do not know)	<input type="checkbox"/> <input type="checkbox"/>
13	Did anyone sleep under this mosquito net last night?	<input type="radio"/> Yes <input type="radio"/> No (Skip to Q. 19) <input type="radio"/> Not sure* (Skip to Q. 19)
14	Who slept under this net last night? Enter line number of the first person that slept under this net. (Get this from the paper job aid "Persons roster")	<input type="checkbox"/> <input type="checkbox"/>

⁸ The responses to questions 9 and 10 will need to be customized for each survey.

No.	Variable	Response scale
15	Line number of the second person that slept under this net. (Get this from the paper job aid)	<input type="text"/> <input type="text"/>
16	Line number of the third person that slept under this net. (Get this from the paper job aid)	<input type="text"/> <input type="text"/>
17	Line number of the fourth person that slept under this net. (Get this from the paper job aid)	<input type="text"/> <input type="text"/>
18	Line number of the fifth person that slept under this net. (Get this from the paper job aid)	<input type="text"/> <input type="text"/>
19	IF there is another bed net in the household click "Add new record" on the next screen. IF there are NO MORE bed nets, close this questionnaire by clicking "Finish for now" . Proceed to the next household.	

*Note that the "Do not know" or "Not sure" responses to the following questions are asterisked in this paper version of the questionnaire:

- Household questionnaire, question 20
- Persons roster, questions 9, 11 and 16
- Nets roster, question 13

The asterisks indicate that if this response is given, the respondent does not know the required information. As far as possible, interviewers should probe to find another person in the household who does know this information. If the answer remains "Do not know" or "Not sure", then interviewers should skip to the next question indicated.

Job aid

Persons roster and who slept under which net last night

Cluster number: <input type="text"/>	Household number: <input type="text"/>	Date:
		Interviewer:

Part A: To be completed BEFORE the persons roster questionnaire on the phone.

*Only record the names of people who slept in the household the previous night. This should NOT include all family members (if one of them slept somewhere else) and it CAN include people who are NOT family members (e.g., friends, temporary visitors or domestic servants).

*Start with the head of the household. If the head of the household DID NOT sleep here last night, start with the oldest person.

Person number	Name
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	

Part B: To be completed BEFORE the net roster questionnaire on the phone. *Write the person number from above into their box below. We want to know which people slept under which net last night. For each net, list the name and person number that slept under each net last night (moving down the column).

Net 1 <small>Description of net (memory device only)</small>	Net 2	Net 3	Net 4	Net 5
Name: Person number: <input type="text"/>	Name: Person number: <input type="text"/>	Name: Person number: <input type="text"/>	Name: Person number: <input type="text"/>	Name: Person number: <input type="text"/>
Name: Person number: <input type="text"/>	Name: Person number: <input type="text"/>	Name: Person number: <input type="text"/>	Name: Person number: <input type="text"/>	Name: Person number: <input type="text"/>
Name: Person number: <input type="text"/>	Name: Person number: <input type="text"/>	Name: Person number: <input type="text"/>	Name: Person number: <input type="text"/>	Name: Person number: <input type="text"/>
Name: Person number: <input type="text"/>	Name: Person number: <input type="text"/>	Name: Person number: <input type="text"/>	Name: Person number: <input type="text"/>	Name: Person number: <input type="text"/>

HANDOUT

Interview questionnaires: Comments and questions

Questionnaire/section	Comments and questions
1. HOUSEHOLD questionnaire	
Interviewer name	
Cluster number and household number	
Interviewer able to interview this household	
Consent obtained	
Name of head of household	
Household in rural or urban area	
Distance/time to nearest health facility	
Bed net questions	
IRS questions	
Household characteristics	
Job aid – PERSONS ROSTER and WHO SLEPT UNDER WHICH NET LAST NIGHT: complete Part A (Person line number and name) before starting data entry for Persons Roster	
2. PERSONS ROSTER	
Roster of persons in the household that slept there last night	
Children under five years of age ill with fever in last two weeks (blood taken for testing? seek advice or treatment? take any drugs for the illness?)	
Job aid – PERSONS ROSTER and WHO SLEPT UNDER WHICH NET LAST NIGHT: complete Part B (Nets and who slept under each net) before starting data entry for Net Roster	
3. NET ROSTER	
Net you are collecting information about	
Source and type of net	
Who slept under this net	
NOTES	

Session 4

Questionnaire contents and using the mobile phone for data collection

Overall goal	To gain knowledge and skills through practice in administering the questionnaires for the household survey, using the mobile phone to collect data
Objectives	By the end of this session, participants will be able to: <ul style="list-style-type: none"> • better understand the content of the questionnaires • explain the intent of the questions and the possible responses • explain the importance and the elements of informed consent • gain confidence and skills in navigating on the mobile phone • correctly enter data using a mobile phone, in response to answers given by the respondent
	190 minutes + 40 minutes optional activity
Methods	Presentation, large group discussion, pairs role-play
Materials/ preparation	<ol style="list-style-type: none"> 1. Write the “Terms” on a flipchart. 2. Arrange to have samples available of some ACTs and other anti-malarial drugs and drugs to reduce fever that are commonly used in the survey area⁹. 3. Print one copy of the job aid “Medicines used to treat fever and malaria in children” for each participant. 4. Invite a resource person to make a presentation about malaria diagnosis and treatment. This should include some information about the national policy for the diagnosis and treatment of malaria. In advance of the training, introduce the purpose of the survey to this person and provide a copy of the training agenda and the “RAMP survey: questionnaire paper training tool” to him/her. 5. Write the importance and elements of “Obtaining consent” on a flipchart. 6. Print one copy of the job aid “Obtaining informed consent” for each participant. 7. Prepare a “Mobile phone sign-out” form. 8. Review and revise (if needed) the sample PowerPoint presentation “Mobile phone basics and introduction to EpiSurveyor”. 9. Print one copy of the (revised) handout “Mobile phone basics and introduction to EpiSurveyor” for each participant. 10. Prepare the flipchart on “Using the mobile phone”. 11. Write the key information for “Case scenario: household A” and “Case scenario: household B” on flipcharts. 12. Print two copies of the job aid “Persons roster and who slept under which net last night” for each participant. 13. Set up LCD projector, laptop and screen.

⁹ See also www.actwatch.info/resources for a full list of anti-malarials.

Steps

1. Introduction

- 1.1 Begin the session by explaining that the next few sessions will focus on understanding the questionnaires and using them to carry out the household interviews. Tell participants that one of their most important roles is to collect good quality data for this survey. They will be collecting the data during the household interview, using the mobile phone and the survey questionnaires.
- 1.2 In this session, participants will have the opportunity to better understand the structure of the questionnaires, the contents, the intent of the questions and the possible responses. Some of the key terms will be defined and the content of the questionnaires will be examined. The purpose and the elements of informed consent will be reviewed. Then, working with sample scenarios, they will carry out an interview, entering data using their mobile phones.

2. Key terms and messages (15 minutes)

- 2.1 When you conduct the interview, keep in mind that changes **cannot** be made to the questions. The survey questionnaires are standardized. This means that the questions **must** remain as they are worded, in the order that they appear.
- 2.2 Post the flipchart “Terms” and say: *There are a number of terms that appear in the questionnaires and that we will talk about during this training and survey. These terms include:*
 - household
 - head of household
 - respondent
 - sleeping space
 - ITN (insecticide-treated bed net)
 - LLIN (long-lasting insecticide-treated net)
 - IRS (indoor residual spraying)
 - anti-malarial drugs (ACT and non-ACT)
 - person line number

Every one of these terms will be defined and discussed in the coming days, and it is important that everyone fully understand them. We will start today to go into more detail for three of these terms: ITNs, LLINs and ACTs.

Malaria treatment and diagnosis (30 minutes)

- 2.3 Say: *In this survey you will collect data related to testing for malaria and the treatment of fever in children under the age of five years. These data are collected in the persons roster.*

Children under the age of five years are at a higher risk of malaria. If a child (or anyone) has malaria it is important that the person receive the proper treatment early. Children must be treated with anti-malarial drugs at a health facility as per National Malaria Control Programme (NMCP) treatment and referral protocols immediately on the onset of fever or other danger signs of malaria.

- 2.4 Ask participants what they think are the approved anti-malarial treatment regimens. Ask the participants what they know about how malaria is diagnosed. Wait for a few responses and correct any misinformation. See the box below for general information about anti-malarial treatment regimens and diagnosis of malaria. This information needs to be customized for your survey area. If a specialized resource person has been invited to lead this part of the session, introduce them and invite them to make their presentation.

Anti-malarial treatment regimens and diagnosing malaria

If a child has malaria the child needs to be treated early and needs to take malaria medicine. The child should be taken to the closest health centre when the child has fever or any of the other symptoms or danger signs of malaria. Other symptoms or danger signs of malaria are: flu-like illness, shaking chills, headache, muscle pains, tiredness, nausea or vomiting, diarrhoea. At the health centre the child will be seen by a doctor or nurse and will receive medicine (“malaria drugs”) if they are sick from malaria. It might happen that the child does not have malaria, and that the fever is due to another illness. The nurse or doctor might then prescribe a drug to help reduce the fever and treat the illness.

Not all children are brought to a public health facility or see a public health worker. Advice or treatment can be sought from other sources such as a private health facility, private pharmacy, a shop or stall in a market, or traditional practitioners. Sometimes, children are treated at home or do not receive treatment.

There are many anti-malaria drugs that can be given. This will depend on the NMCP treatment and referral protocols immediately upon onset of fever and other danger signs of malaria. In many settings, the type of malaria drug that is considered to be the best is called an “ACT”, which stands for artemisinin-containing combination therapy. To be most effective, ACT must be taken within 24 hours of the onset of fever. It is important to complete the malaria treatment dose that has been prescribed. There can be many brands of ACTs that are found in a country/district.

To be certain that the child has malaria, a blood test must be done. This involves taking a very small amount of blood (by pricking either the finger or the heel) and testing the blood for malaria parasites.

- 2.5 Ask if anyone has questions or comments about the anti-malarial drugs or the approved anti-malarial treatment regimens available, or about blood tests for malaria. Ask if anyone has a question or comment about that section of the persons roster that asks about children under five years old that have had fever in the last two weeks. Respond to questions and clarify information.
- 2.6 If possible, arrange to have samples available of some ACTs and other anti-malarial drugs and drugs to reduce fever that are commonly used in the survey area. Distribute the job aid that lists or shows these drugs.
- 2.7 Check if there are any remaining questions. If not, tell the participants that they will now have the opportunity to take part in an interview. We will start by looking at one of the first steps in the interview, obtaining informed consent.

3. Informed consent (30 minutes)

- 3.1 Explain that it is essential that informed consent is obtained for every interview. Ask:
 - ➔ *What do you think is meant by informed consent?*
 - ➔ *In trying to obtain informed consent for a household interview, what do you think would be the information that needs to be shared with the person?*
- 3.2 Post the flipchart with the elements that should be addressed in obtaining consent. Compare this list to comments offered by the participants. Point out any additional important points on the prepared list.

Obtaining informed consent

Why is it important? Ethical practices and respect for persons requires that people are given adequate information to allow them to make an informed and voluntary decision whether or not to participate in this survey.

Elements:

- Greetings and introduction
- Consent must be given by a responsible adult member of the household
- Purpose of the survey
- Procedures (answer questions, time needed, use of mobile phone)
- Confidentiality
- Voluntary participation
- Importance of the survey
- Any questions?
- Giving consent

Tell participants that a script for obtaining consent for this survey has been prepared for them. Distribute the job aid “Obtaining informed consent”. Ask for a participant to read the text. Ask if there are any questions or comments. Respond to questions and clarify information. Tell the participants that they will be expected to use this script when they carry out the household interviews. A variation would be to arrange for two volunteers to role-play the approach to the household and obtain consent, with the interviewer using the script as a guide.

4. Distribution of mobile phones (15 minutes)

- 4.1** Tell the participants that the mobile phones will now be distributed. (Alternatively, the trainers can decide to carry out the distribution during the lunch break. The sample agenda uses this option.) Each person will have a mobile phone for use during the training and for use during the fieldwork. Explain that the mobile phones are individually identified: the unique number assigned to each phone and the PIN for the phone can be found on the label that is affixed to the back of each phone. Each person will keep the same phone for the duration of the training and the field survey.
- 4.2** Arrange for each person to come forward to receive a mobile phone. A record of receipt of a mobile phone for each person should be obtained, using the “Mobile phone sign-out” form. A decision will need to be made by the training team whether the mobile phones are to be returned at the end of each day, or if the participants will be allowed to keep them for the duration of the training. This decision will be influenced by factors such as: whether or not revisions will be made to the questionnaire(s), whether the survey organizers need the mobile phones to make final preparations for the survey, and so on. It is helpful if the participants are able to keep the mobile phones for the training duration, because it will give each person the chance to practise more with his/her phone and become more familiar with using the mobile phone to enter survey data. The phones will need to be returned to the survey coordinator at the end of training because final preparations for the survey must be done (e.g., questionnaires uploaded to each phone for survey implementation).

5. Using the mobile phone for this survey (45 minutes)

- 5.1** Say: *All of you will now start to use your mobile phone. In this activity, I will guide you through a number of steps that will show you how to start to use your phone for this malaria survey. I will give you specific instructions and I want you all to listen to me and to follow my instructions. Are you ready to start?*

Distribute one copy of “Mobile phone basics and introduction to EpiSurveyor” (Magpi) to each participant.

5.2 Using the set of PowerPoint slides (optional), lead the participants through the following activity about mobile phone basics and introduce them to EpiSurveyor (Magpi).

Launch the topic of getting started with your mobile phone by talking about the basic features of a mobile phone. Tell the participants to carry out some of the first steps to enable them to use the mobile phone and administer one of the survey questionnaires: that is, turn the phone on, navigate to the survey questionnaire “Household questionnaire”, open EpiSurveyor (Magpi) and select the questionnaire from the Forms list.

Guide the participants to enter data for informed consent, illustrating what happens if consent is not obtained, and what happens when it is obtained. Navigate through some of the first screens/questions, using the left soft key (Option->Next). Instruct the participants to go to the “Finish for now” screen.

Explain to them that this screen also has the option “Send data to server” and that this action is the responsibility of the supervisors and interviewers. Describe how to send data to the server and provide tips on troubleshooting.

Describe the different types of questions in the survey, and explain what a record is.

Encourage the participants to keep the handout nearby for future reference, as needed.

Ensure that the various functions and features of the mobile phone are shown and if appropriate, explained.

Basic features

- Display screen
- Function buttons
- System settings
- Data quality checks
- Power
- Care of the mobile phone
- Troubleshooting
- Navigating the forms
- How to enter numbers
- How to enter text
- Next and back (previous) buttons
- Error warnings (e.g., must answer all questions, no blanks, upper limits for numeric data)
- Skip patterns depend on response. Different answers go to different questions or sections of the questionnaire e.g., for question “Consent obtained?” If Yes, the next question concerns the cluster and household number. If the response is No (consent not obtained) then the interviewer will find that he/she has skipped to the last question of this questionnaire, and is told to proceed to the next household.

5.3 Option: using the emulator: An alternative technique to the previous one is to use the EpiSurveyor (Magpi)/emulator function to demonstrate the mobile phone and questionnaire basics to the participants. This technique has some advantages over the previous one (the participants can see the actual screen in real time and follow along more easily) but a disadvantage is that it requires an internet connection and this may be difficult to obtain in some settings and may add to the trainer’s workload.

After the internet connection is obtained, go to the EpiSurveyor/emulator. Navigate to the household questionnaire screen. Once there, say: *On the screen at the front of the room you will be able to see the actual screens of the cell phone. Together, we will walk through the basic settings and functions of the cell phone, and enter data for our survey. We will do this using the household questionnaire. OK then, let's begin.* Make the presentation, ensuring that the various functions and features of the mobile phone are shown and if appropriate, explained.

- 5.4** Ask: ➤ *How did you feel about this exercise? What stood out for you as you used the mobile phone and actually began for the first time to use the mobile phone for this survey? Does it (the mobile phone) seem like an easy technology? Or is it difficult? What difficulties did you have? For those of you with previous experience in carrying out paper-based surveys, did you notice any similarities to paper-based questionnaires?*
- 5.5** Post the flipchart on “Using the mobile phone”. Draw a large picture of a mobile phone and its basic features on the flipchart. Refer to the flipchart and use the drawing to emphasize some of the main features of using the mobile phone and navigating through a survey questionnaire. Keep this flipchart posted as you might find it useful to return to during the training.

Using the mobile phone

- The Select/Options button is used a great deal
- To select an answer make sure the circle is filled in with a black dot
- Top of screen shows which question you are on

- 5.6** Congratulate the participants on entering data on the mobile phone. They have just entered data for a part of one of the survey questionnaires. Tell the participants that in the next activity, they will begin to enter data for a household interview.

6. Conducting the interview: an exercise in pairs (75 minutes)

- 6.1** Begin this session by explaining that all participants will now have the chance to practise conducting an interview. Divide the participants into pairs.
- 6.2** Describe the role-play as follows. Each pair should decide who is going to play the interviewer first and who is going to pretend to be a respondent. After the interview is over, they should switch roles so that each person gets the opportunity to practise being the interviewer. Stress that it is important that they **do** switch roles, because this will give them the chance to be part of the interview from both sides: that is, from the perspective of the respondent and of the interviewer.
- 6.3** Ask the participants to state what the order of the questionnaires should be. The order indicated should be: the first questionnaire to be administered is the household questionnaire, followed by the persons roster and then the net roster. Ask when the job aid needs to be completed. The correct answer is that Part A is completed after the household questionnaire and before the persons roster is started and Part B is completed before the net roster. Emphasize that the job aid must not be completed at the start of the interview. Distribute two copies of the “Persons roster and who slept under which net last night” job aid to each participant (the additional copy can be used as an extra for future use and practice).
- 6.4** Post the flipcharts that describe the different role-play scenarios, and describe each scenario to the group. When identifying the members of the household, give each person a name that is appropriate to the local setting.

- 6.5** Tell the participants that all pairs should begin with scenario A. If both participants complete scenario A (that is, each person has played both the role of the interviewer and the respondent), then they can carry out another role-play, using scenario B.

Scenario A >

- Cluster number 25, household number 3
- Poor household, rural
- 3 kilometres from the nearest health facility
- Husband (28 yrs old), wife (22 yrs old), 2 children (6 yrs old, 5 months old)
- 2 bed nets: 1 untreated (bought at market), 1 LLIN from last campaign (brand <provide name>, held 3 months ago)
- Last night, couple and their 5 month old baby slept under LLIN, 6 yrs old slept under untreated net
- The 6 yrs old had a fever in the past two weeks, he was treated at home with ibuprofen, and he was not tested for malaria

Scenario B >

- Cluster number 16, household number 4
- Poor household, rural
- Husband (35 yrs old), wife (25 yrs old) and wife's mother (widow, 47 yrs old)
- Three children (7 yrs old son, 6 yrs old daughter, and 2 yrs old son)
- Two bed nets in the household: 1 LLIN received at local health facility (during Child Welfare clinic) 2 years ago, and 1 LLIN received during last mass campaign distribution held 5 months ago
- Slept under nets last night: under the LLIN net received from the mass campaign, 2 yrs old son and his mother; under LLIN from the Child Welfare Clinic, no one (it is still unopened and in the original packaging)
- The 2 year old boy had fever last week, and was taken to the health clinic the day he came down with fever. He was tested for malaria and ACT was given.

- 6.6** Explain that you will walk around to observe, but that they should not stop their role-play when you come close to them. If there are any questions or problems they should raise their hand and you will be there to help them.
- 6.7** Walk around the room and observe the pairs during their role-play. Observe the data entry and ensure that all participants are using the mobile phone correctly to enter the data. Check to ensure that the interviewer is using the "Persons roster and who slept under which net last night" job aid. Check to ensure that they switch roles during the exercise, and that they continue with a new scenario once the previous one has been completed.
- 6.8** When the time is up, ask if there are any questions about this exercise or if anyone would like to comment on it. Answer questions and provide clarifications, as needed.

7. Wrap-up and Day 1 review (15 minutes)

- 7.1** Thank everyone for their participation and tell them that during this training, we want to make sure that every one of them is fully able to carry out an effective interview. In the next session, there will be another opportunity to practise the interview.
- 7.2** Wrap-up the day by carrying out a review of the day's sessions, referring back to each of the session objectives. Participants can be invited to recall the topics of the day, and sum up what has been covered, mentioning key messages and what they have learnt. They can also be asked to provide feedback on how they feel the training is going.

Say: *Today you will be able to take your mobile phones and chargers with you when you leave the training. This will give you a chance to become more familiar with the phone and with the questionnaires. Please remember that these phones are for the survey and are to be used only by you: they are a research and an evaluation tool, and are not to be used to phone people, to play games, to browse the internet, and so on.*

- 7.3** The decision to allow participants to take the mobile phones home may depend on whether there are any tasks that the training team needs to carry out during the evening that require having the phones (e.g., monitoring data collected during training, and so on.) There may be some participants who do not want to take the phone with them at the end of the training day.

8. Museum walk (optional activity) (40 minutes)

It is recommended that this exercise can be done at the beginning of the second day of training. If desired, the training team can also use the method at other times during the training, to address additional concepts and topics.

Tell the participants that you know that they had a very intense first day of training. A great deal of information was shared, and there were many concepts, terms and tools that were introduced to them. Tell them that will be invited to a “museum” now. There are five “displays” that have been mounted on the wall for them to visit. The contents of each display relate to a general topic or theme, and consist of a question or statement. Five displays are described below. (If you have fewer than five groups, eliminate some of the displays but make sure to address their content later in the training).

- A. What is the purpose of this survey?
- B. In a malaria RAMP survey interview there are three questionnaires that must be used. Name these.
- C. In the RAMP survey interview, a job aid is completed *before* you start the persons roster and the net roster questionnaires. (i) What is the purpose of the job aid? (ii) How does Part A of this job aid help to complete the persons roster? (iii) How does Part B help to complete the net roster?
- D. What is an ITN? Name two types of ITNs.
- E. Many households in the region own bed nets. What are some of the sources of these nets?

Arrange the participants in groups of three to five people. (Create the same number of groups of participants as you have displays.) Instruct the participants to:

- Move, with your group members, to one of the five displays. (Only one group should be in front of each display at a time.)
- Read out loud the statement or question that is on the display.
- Discuss the statement or question. Each person should be encouraged to express him/herself. Answer the question in full.
- *After a few minutes, move over to the next display. Repeat the procedure at this station. Continue* to repeat this procedure until your group has visited all the displays.

Ask if there are any questions before they begin.

When all groups have viewed all the displays, reconvene the groups and, display by display, ask for a volunteer to provide an oral presentation that addresses the statement or answers the questions related to that display. Invite others to contribute their views. Clarify, correct, or add more information, if needed.

JOB AID

Medicines used to treat fever and malaria in children¹⁰

Listed below are the following types of medicines:

1. Medicines used to treat fever that are not anti-malarials
2. Anti-malarial medicines: Artemisinin-containing combination therapies (ACTs)
3. Anti-malarial medicines: non-ACT anti-malarial medicines
4. Anti-malarial medicines: others

1. Medicines used to treat fever that are not anti-malarials

Product taken by the child	Most commonly used	Others
Antibiotic pill or syrup	xxxx	xxxx
		xxxx
		xxxx
Antibiotic injection	xxxx	xxxx
		xxxx
Acetaminophen	xxxx	xxxx
		xxxx
		xxxx
Ibuprofen	xxxx	xxxx
		xxxx
		xxxx
Aspirin	xxxx	xxxx
	xxxx	xxxx
		xxxx
		xxxx
Others, including cough syrup, cold remedies, etc.		

¹⁰ Example adapted from Nigeria. This job aid **must** be customized for each survey.

2. Anti-malarial medicines: Artemisinin-containing combination therapies (ACTs)

Artemether / Lumefantrine (AL)		
Most commonly used	Others	
Coartem	Arenax Plus	Cofeteran
Lonart	Malashop	Peridon
Artemefen	Zymal	Famter
	Lynsumete	Artemin
	Nimartem	Latesen
	Fynale	Lokmal
	Combisunate	Limal

Artesunate / Amodiaquine (A/A)	
Most commonly used	Others
Larimal	ASAQ (winthrop)
	Malmed
	Artesmodia
	Coarsucam
	Camosunate
	Artephis
	Arsumoon
	Dart

Dihydro Artesmisinin / Piperaquine	
Most commonly used	Others
P-Alaxine	Duocotexine
	Waipa
	Solarterp
	Artexim

Artesunate / SP or Artesunate / Mefloquine	
Most commonly used	Others
Farenax	Artequine (Artesunate mefloquine)
Coarinate (Artesunate)	Affloquine (ASP + mefloquine)
	Thydop
	Artesunate / mefloquine
	Fansidar + mefloquine

Other ACTs	
Most commonly used	
	Artequine (Artesunate mefloquine)
	Affloquine (ASP + mefloquine)
	Artesunate / mefloquine

3. Anti-malarial medicines: non-ACT anti-malarial medicines

SPs	
Most commonly used	
Fansidar (Fansidar)	Malareich
	Ridmal
	Laridox
	Metakelfin
	Vitadar
	Maloxin
Chloroquine	
Chloroquine	xxxx
	xxxx
Amodiaquine	
Amosdiaquine (Canoquine)	xxxx
Quinine	
Quinine	xxxx
	xxxx

4. Anti-malarial medicines: others, including Artemisinin-containing monotherapies (not ACTs)

Most commonly used	Others
	Artesunate
	Artemeter injection
	Lariam (mefloquine)
	Fansidar + mefloquine

JOB AID

Obtaining informed consent

The survey team members should be correctly identified as being from the Red Cross Red Crescent National Society by wearing the bib/identification badge/apron/t-shirt provided for the survey, and should behave according to the code of conduct of the National Society and the principles and values of the Red Cross Red Crescent Movement.

Upon reaching a household, the interviewer should ask to speak to an adult/the head of the household. The interviewer should introduce him or herself and explain the purpose of his/her visit. To obtain informed consent, an informed consent statement should be read to the (potential) respondent.

Informed consent statement

The interviewer should proceed as follows.

Say: “Good morning/good afternoon Sir/Ma’am. My name is and I am a volunteer with the <insert name of Red Cross Red Crescent National Society/lead organization>. The Red Cross Red Crescent is working with the Ministry of Health and other partners to improve malaria prevention in <insert name of region/district>. Malaria is a major problem in our <region/district> and we are working together to carry out a survey about malaria prevention. Your village is one of 30 randomly selected villages where the survey will be conducted. We are visiting people in their homes and your household has been randomly selected to see if you would be willing to share some information about the malaria-related activities regarding your family.”

Say: “We want to learn how well the malaria prevention programme is working in <insert name of area>. I would like to ask you some questions about mosquito bed net use in your home, and also some general questions about your child[ren]’s health and other things that are linked to malaria. This should only take about 20 to 30 minutes. A mobile phone will be used to collect the information you provide.”

Say: “Note that your participation in this survey is voluntary. You can refuse to answer any questions and can end the survey at any time. If you agree to take part, your answers to all questions will remain strictly confidential. No information released about this survey will bear your name or identity. I hope that you will participate in this survey since your views are important and the survey will help the health of the children and families in <name of region/district>.”

Say: “At this time, do you have any questions about the survey?”

Say: “Do you agree to participate in this survey? May I begin the interview now?”

Once the interviewer has the consent of the household to participate in the survey, he/she should begin to administer the survey. On completing the interview, the interviewer should say:

Say: “Thank you very much for your time today [and for allowing me to come into your home]. Make sure that all members of your household sleep under insecticide-treated bed nets every night of the year to be protected from malaria.”

If the respondent refused consent to participate in the survey, the interviewer should be polite and thank the person for their time.

Sample form

Mobile phone sign-out

Mobile phone sign-out form					Day of training/Date:		
Phone ID	Phone brand and model ¹¹	SIM PIN code	Last name	First name	Signature	Time out	Time in
1	e.g., Nokia 2700	64xx					
2		84xx					
3		35xx					
4		74xx					
5		25xx					
6		99xx					
7		49xx					
8		45xx					
9		27xx					
10		43xx					
11		15xx					
12		82xx					
13		42xx					
14		22xx					
15		57xx					
16		24xx					
17		92xx					
18		67xx					
19		93xx					

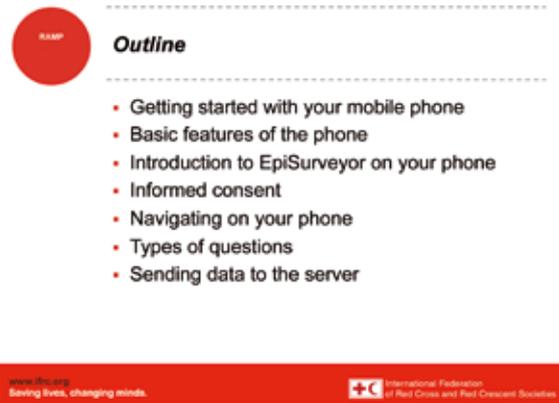
¹¹ Note that the RAMP survey can be administered using a mix of phone brands and models.

HANDOUT*

Slide 1



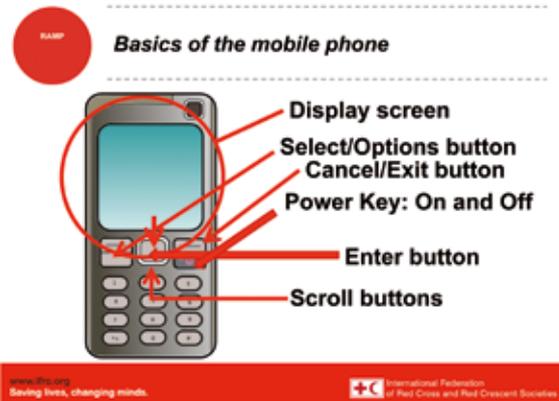
Slide 2



Slide 3



Slide 4



* This has been prepared as a PowerPoint presentation, but may also be printed as a handout for the participants (format and number of slides per page to be determined by the trainer). The PowerPoint version of the slides may be downloaded from the RAMP website (www.ifrc.org/ramp).

Slide 5

RAMP *Introduction to EpiSurveyor on your mobile phone*



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Slide 6

RAMP *How to open EpiSurveyor*

- Select **Menu**
- Open **Apps** folder
- Open **Games** folder
- Click enter to open **EpiSurveyor**
- This will take you to your **Forms List** or **'Home screen'**
- Your **Home screen** is where you find all of your Questionnaires



Use as PP Presentation and/or Handout

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Slide 7

RAMP *Selecting your questionnaire*

- Use your scroll keys to move from one questionnaire to the next
- Your questionnaire will be highlighted in blue when it is selected (see diagram)
- Click Enter to select the questionnaire



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Slide 8

RAMP *Informed consent*

- Follow the suggested script to obtain consent
- If consent is obtained you can carry on with the interview. If it is not, you will be automatically taken to the last question: follow the instructions to end the record.



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Slide 9

RAMP **Household questionnaire - the last question**

- In the Household questionnaire the 'last question' appears as a label
- You must follow the instructions and select 'Options' on the bottom left soft key
- This will take you to your 'End screen'



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Slide 10

RAMP **Record Finished- The 'end screen'**

- Record Finished is your 'end screen'
- To return to your 'home screen' and complete your record select 'Finish for now'
- To add new records select 'Add new record'



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Slide 11

RAMP **Navigating through your questionnaire 1**

- To advance to the next question once you have answered a question either:
 - Press the 'Options' button twice;
 - or
 - Press the 'Options' button and then press Enter button



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Slide 12

RAMP **Navigating through your questionnaire 2**

- To go to the previous question:
 - Select Options
 - You will see the menu screen appear
 - Scroll down to the second option 'Previous' and press 'Enter' button



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Slide 13

RAMP **Types of questions**

Radio buttons
To select an answer make sure the circle is filled in as a back dot

Label question
This "question" provides you with information ONLY

Text question
Use the phone keys to insert text

Number questions
Use the phone keys to insert numbers

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Slide 14

RAMP **What is a record?**

- A record is a data entry for each event you capture
- In the Household questionnaire, **ONLY** one record will be captured for each household
- In the Persons roster, 1 record will be captured for **EACH PERSON** in the household (1 person = 1 record, 6 people = 6 records, and so on)
- In the Net roster, 1 record will be captured for **EACH NET** in the household (1 net = 1 record, 3 nets = 3 records, and so on)
- Example: A HH with 3 people and 2 nets will have 1 HH questionnaire record, 3 person roster records and 2 net roster records

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Slide 15

RAMP **Sending data to the server 1**

- Every day, you will need to send data records to the server
- From your **home screen** scroll to highlight the questionnaire from which you want to send data
- Press the Options button to get your menu screen

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Slide 16

RAMP **Sending data to the server 2**

- Scroll down to 'Send data to server'
- Press Select button
- You will see the message 'Sending record'
- You have successfully sent data to the server when you see the message 'x records sent, 0 unsent'

Use as PP Presentation and/or Handout

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TRAINER'S NOTE

Answer key to the museum walk exercise

Trainer's briefing notes

A. What is the purpose of this survey?

The purpose is to estimate ownership and usage of ITNs in <domain of the survey>. Information about IRS and anti-malarial treatment and the diagnosis of malaria in children under five years of age will also be collected and analysed.

B. In a malaria RAMP survey interview there are three questionnaires that must be used. Name these.

1. Household questionnaire
2. Persons roster
3. Net roster

C. In the RAMP survey interview, a job aid is completed before you start the persons roster and the net roster questionnaires. (i) What is the purpose of this job aid? (ii) How does Part A of this job aid help you to complete the persons roster? (iii) How does Part B help you to complete the net roster?

(i) It helps to ensure that good quality data are collected; helps the interviewer remember key information (e.g., names and line numbers of the people who slept in the household last night); and helps to recall the number and the brands of nets that are owned by the household.

(ii) In the persons roster, data are collected on every person that slept in the household last night. Each person will be given a unique person number. This person line number is written on Part A of the job aid (column 1) and then the information is used to complete the persons roster (question, "Line number of the person in the household"). Part A of the job aid must be completed before you can begin the persons roster questionnaire on the mobile phone.

(iii) In the net roster, data will be collected for EACH net that is owned by the household. Part B of the job aid can help to number the nets and describe them in a way that helps when completing the net roster. Question, "Net number, INTERVIEWER ONLY: Which net are you collecting information about? If the first net PUT number 1, if the second net PUT number 2, etc. (use consecutive numbers)".

The name of the person who slept under each net and the person's line number is written on Part B of the job aid (nets section) and then the information is used to complete the net roster, question, "Line number of the <first person, second person, third person, fourth person, fifth person> that slept under this net".

Part B of the job aid must be completed before you can begin the net roster questionnaire on the mobile phone. An appropriate time to complete Part B can be right after you have finished the data entry for the persons roster questionnaire

and closed the form. If there are no nets owned by a household then Part B of the job aid does not need to be completed and the net roster does not need to be opened. The interviewer will not need to enter data in the net roster.

D. Types of bed nets

ITN stands for “insecticide-treated bed net”. A LLIN (long-lasting insecticide-treated net) is an ITN. It is a net that has been factory-treated before the point of purchase or distribution. The net does not require any further treatment. It can be effective for three years or more. (Find out what the NMCP says about the life of the LLINs distributed in the region/country. There are a number of manufacturers of LLINs and different brands are available.)

A pre-treated bed net can also be an ITN. This is a net that has been previously treated with an insecticide. The net requires further treatment after six to twelve months. (Find out what the National Malaria Control Programme says about the duration of the treatment.)

Untreated bed net: Bed nets that have never been treated with insecticide are considered to be an untreated net.

Bed nets previously treated with insecticide may have lost their strength due to washing or because they were treated more than six to twelve months ago. However, nets that were treated more than six to twelve months ago can be retreated with insecticide to improve the protection they provide. In addition, nets that have never been treated with insecticide can be treated to improve the protection they provide.

E. Many households in the region own bed nets. What are some of the sources of these nets?

Provide information about the ways that bed nets are usually distributed to the population included in this survey. Describe the mass distribution campaigns that have been held most recently and going back a few years. Describe the ways that bed nets are distributed through the routine health services (e.g., during antenatal care services or child welfare clinics). Mention other sources of bed nets (markets, retail shops, pharmacies, friends and relatives, and so on). Make sure that the information shared accurately reflects the reality in your survey area. Point out that section of the net roster that asks a question about how many months ago the household obtained the bed net and where a bed net was obtained. Mention that if a bed net was distributed during a fairly recent mass campaign it will be a LLIN.

Session 5

Conducting the interview (Part 1): Interview questionnaire review and role-play

Overall goal	Acquire the skills and knowledge to conduct an effective interview
Objectives	By the end of this session, the participants will be able to: <ul style="list-style-type: none"> • demonstrate experience and skills in navigating through the questionnaires • define key terms (such as household, household head, eligible respondent, sleeping space) • identify the characteristics of an effective interview
	105 minutes
Methods	Role-play, large group discussion
Materials/ preparation	<ol style="list-style-type: none"> 1. Prepare a flipchart with “Ground rules for role-play”. 2. Prepare a flipchart with questions relating to “Conducting the interview”. 3. Prepare flipcharts with definitions of: a household, household head, sleeping space, eligible respondent. These definitions should be obtained from the survey coordinator before the start of the training. 4. Make arrangements to collect a sample of commonly-used bed nets and use them in preparing the interviewer job aid “ITN labels and packaging”. The bed nets that were distributed during the last mass campaign should be included on this job aid. 5. Print one copy of the job aid “ITN labels and packaging” for each participant. 6. Arrange a role-play station with two chairs and two microphones.
Steps	<p>1. Conducting the interview: a role-play (90 minutes)</p> <ol style="list-style-type: none"> 1.1 Explain that in this session, participants will carry out a role-play in front of the whole group. The language will be English (or other language, as decided for the survey). By now, the participants have all had a chance to become familiar with the questionnaires and the job aid, to use their cell phones and to take part in a role-play. Ask the participants to indicate (by raising their hand): <i>How many of you feel that you have gained skills in using the mobile phone to enter data? How many feel that you have gained some understanding of the survey questionnaires? Of the job aid?</i> Praise the participants for the progress they have made so far, and let them know that every day they will make even more progress. 1.2 Tell the participants that in this role-play, a different household has been chosen for the survey. Describe the procedure for the role-play as follows. In this exercise, two participants will be the “actors”: one person will be the interviewer, and one the respondent. The rest of the participants will observe the role-play, and listen carefully to the dialogue. They will listen to the responses to the questions, and enter the data using their cell phones. 1.3 Ask for two volunteers, one person to play the role of the interviewer and one to be the respondent (the person to be interviewed). (For this role-play it may be preferable to ask a female participant to play the role of the respondent.)

- 1.4** Arrange the room for the role-play exercise. Place two chairs at the front of the room, and arrange the seating so that all participants are able to see the actors. All participants must be able to hear the mock interview, so make arrangements to minimize the noise level in the training room (e.g., place a “Please do not disturb” sign on the doors and close the windows). Provide each of the role-play actors with a microphone.

Provide information and instructions to the role-play actors. Describe the general features of the household that has been selected for this interview. Give appropriate local names to the members of the household. The household features are as follows:

Features of the household

The household is in a rural area. It is in cluster number 18, and is household number 4. It is composed of three adults: a couple (a man and his pregnant wife) and the man’s sister. The husband is 31 years old, his wife is 25 years old and the man’s sister is 22 years old. There are three children in the household: the couple has an 18 month old boy and a seven year old boy. The man’s sister has a seven month old girl. There are three sleeping spaces in the household. There are three nets in the household, two LLINs and one untreated net. One LLIN was obtained by the wife during the last mass distribution campaign. One LLIN was obtained by the sister-in-law from the health clinic when she went to antenatal care during her pregnancy. The sister-in-law brought the untreated net with her when she moved into the household recently, after her husband left the country to work overseas for two years. Last night, the couple and their 18 month old son slept under one of the LLINs, and the sister-in-law and her baby girl slept under the other LLIN. No one slept under the untreated net. It is rolled up and kept in a cupboard. The sister-in-law’s baby girl had fever in the last two weeks. When she got sick and had the fever, she was brought the same day to the local health clinic. A nurse did a blood test for malaria. The baby was treated with ACT within 24 hours of the onset of fever.

It can be useful to take the main points of the household scenario and write them on a flipchart or board, and post this so that the specifics can be seen by all during the role-play. The main points could be written as follows:

Household scenario

- Cluster 18, household number 4
- Three adults: man (31 yrs old), his wife (25 yrs old) and man’s sister (22 yrs old)
- Couple have 2 children: 7 yr old boy and 18-month old baby boy
- Man’s sister has a 7 month old girl. Girl had fever last week. Brought same day to health clinic. Tested for malaria. Given ACT and took it same day.
- 3 sleeping spaces in the HH
- 3 nets in the HH: 2 LLINs and 1 untreated. 1 LLIN from mass campaign, 1 LLIN from ANC clinic. Untreated net from market.
- The couple and their baby son slept under a LLIN last night. The sister-in-law and baby girl slept under a LLIN last night. No one under untreated net.

- 1.5** Ask the actors to play “in-character”: that is, the interviewer is to pretend that he is a member of the survey team, and the respondent is to pretend that her household has been selected for this survey and that she is the one answering the questions on behalf of the household.

Give the actors two to three minutes to settle into position and prepare for the role-play exercise.

- 1.6** Post the flipchart “Ground rules for role-play”. The specific rules may differ depending on the approach used to carry out the role-play (see 1.7 below). Read out loud the points on the flipchart (see below).

Ground rules for role-play

- Silence (except the actors)
- Listen carefully
- Follow along, and enter the data on your mobile phone
- Record questions or comments to ask later
- Raise your hand to get help

- 1.7** Tell the participants that they are expected to enter data on their mobile phones as the role-play proceeds, based on the answers that the respondent provides. Assure them that they will be helped by the trainers if they encounter a problem in entering data during the role-play, and that they should raise a hand if help is needed.

Explain the procedure for carrying out the interview. The role-play should be carried out questionnaire by questionnaire. After each questionnaire, the role-play should be stopped by the trainer so that a question and answer period can take place. This means that the role-play will be done first with the household questionnaire, and then Part A of the job aid will be completed, followed by the persons roster questionnaire. Lastly, the job aid Part B will be completed, and the net roster will be done. The interviewer-respondent pair can be changed for each questionnaire, allowing a greater number of the trainees the chance to experience playing a role in the household interview.

Variation 1: if the trainees are having difficulty in following along, the trainer can lead this activity by having only one question/response at a time. This approach allows the trainer to confirm question-by-question that the trainees have understood the intent of the question and the possible responses, and have all been able to navigate using the mobile phone as required.

Variation 2: the role-play should be carried out with the actors completing the entire interview: that is, they will complete the three questionnaires, and use the job aid. The flow of the interview should not be interrupted. This approach may be preferred in those situations where the trainees are already very confident in using the mobile phones to collect data during an interview and are knowledgeable about the prevention and control of malaria.

- 1.8** Ask why the persons roster job aid needs to be completed. Listen to the responses, and if not mentioned, stress that completing Part A of the persons roster is important because the interviewer will need to take the person line number from the persons roster in order to complete the data entry for the persons roster and the net roster. Also, information from Part B of the job aid is essential for completing the net roster.

Ask if there are any questions before the role-play begins. Ask for quiet in the room, and ask the actors to begin the interview.

- 1.9** During the activity, listen carefully to the dialogue between the interviewer and the respondent. Observe the participants. If variation 2, the “uninterrupted” approach, is taken for this activity, call for silence if participants speak or disrupt the flow of the interview.

After the role-play has been completed, thank the actors for their participation and ask for a round of applause.

- 1.10** Post the flipchart “Conducting the interview”, and read out loud the questions written on the flipchart.

Conducting the interview

- ➔ *What stood out for you during this interview?*
- ➔ *What did you notice about the attitude or the behaviour of the interviewer during the role-play? (Probe: was there anything that you thought was really good? Anything that the interviewer should have done or done differently during this interview?)*
- ➔ *Which problems, concerns or questions arose for you in this interview?*
- ➔ *What did you learn from this interview?*

1.11 Use these questions to guide a discussion. First ask for feedback from the actors themselves, and then move to leading a discussion with the full group. Variation: ask the trainees to form a group of two to three people and give them five minutes to discuss and respond to these questions in their group.

Summarize the main points. Reinforce messages such as the following concepts and definitions, using a flipchart:

✓ **Household definition:** the survey that the participants will be conducting is of households, and a clear definition is therefore crucial. Why? You need to know exactly what a household unit is so that you carry out your interview in the right place and with the right people. You also need to know how to locate a household. Place emphasis on making the distinction between a family, where members are related either by blood or marriage, and a household, which involves the sharing of a housing unit, facilities and food. The meaning of family differs across cultures and the household unit will vary for each interview.

Post the definition of a household and refer to it. The following points could be included on the flipchart:

Household

- The household unit will vary for each interview
- One person or group of people, related by family ties or not, who live in the same dwelling and usually eat from the same food pot for the principal meals
- Can have relatives of different generations and other members of the extended family
- Can be foster children, servants
- If polygyny is practised (man has more than one wife) there can be complex residential arrangements. For this survey, the household is usually only one of the wives and her children
- Household members recognize the authority of one person, called the “household head”
- There can be more than one household living in a dwelling (the structure(s) that people live in)
- A dwelling can be vacant or occupied

✓ **Head of household:** often, the household head is the person that gives consent for the interview and is the respondent. Post the definition of a “head of household” and refer to it. The following points could be included on the flipchart:

Head of household

- The person that the household identifies as such
- Usually the authority figure, the person who assumes responsibility for decision-making
- Could be male or female
- There should only be one head of the household
- In the absence of the head of the household, another person can assume decision-making responsibility (the acting head of household)

✓ **Sleeping space:** the goal of the malaria programme is for every person who sleeps in the household to sleep under an ITN. We need to know the number of sleeping spaces to help measure whether this goal is being met.

Post the definition of a “Sleeping space” and refer to it. The following points could be included on the flipchart:

Sleeping space

- A place where people sleep that could be covered by a single bed net
- Can be a bed or a mat or mattress on the floor in any room, and it can be inside the dwelling or outside
- Total number = number of nets needed so that all persons in the household could sleep under a net

✓ **Approaching the household:** the way that a household is approached can make the difference between obtaining permission to interview the household, and having a household refuse to participate.

✓ **Eligible respondent:** someone needs to be the person to participate in the interview and respond to the questions. Who is an “eligible” respondent? Post the definition of an “Eligible respondent” and refer to it. The following points could be included on the flipchart:

Eligible respondent

- Any capable adult member of the household is a suitable respondent for the interview
- The person should be able to provide accurate information about the household (e.g., the nets owned and used last night, the care and treatment of children under the age of five in the household)
- The person must be capable of being interviewed (e.g., must not be intoxicated, must not be mentally handicapped)

✓ **Informed consent:** informed consent must be obtained for each interview. Ask participants to recap what informed consent involves.

Thank the trainees for their participation in this exercise. Mention that there will be one more session in which they will have a chance to practise interviewing, before they head out for the field practice tomorrow (or later in the week if the agenda has been revised).

2. Bed nets: presentation and demonstration (15 minutes)

Explain that ITNs are the most important and effective way to prevent malaria and that one of the main objectives of this survey is to find out if households own and use ITNs. So, how do we know if a net is an ITN?

Introduce the person who will provide a brief overview of the ITNs that are commonly owned and used in the survey area. This person could be one of the trainees, or could be another person who is knowledgeable about the subject matter. Points that the person should stress include: what are the brands of bed nets that have been distributed in the most recent (and other) mass distribution campaigns; what types of mass campaigns have been held (e.g., integrated health campaign, stand-alone distribution, door-to-door distribution, etc.); what brand(s) of bed nets are distributed through the routine health services, and to whom are the nets distributed; what is the type of and extent of treatment kits available. Distribute the job aid “ITN labels and packaging”. Go over the information and ask if there are any questions. Encourage the participants to carry this aid with them to the field, and to use it during their interviews, as needed.

Point out those sections of the questionnaires where data are collected about bed nets. Ask if there are any questions about bed nets and ITNs. Respond to questions and clarify information. At the end of the presentation, thank the presenter.

Mention that, as we have already seen, there are things that can influence the interview and affect its quality.

Say: In this training, we are aiming to increase the skills, attitudes and behaviours of all the interviewers so that an "effective" interview will be carried out in all the households in this survey.

Explain that in the next activity, we will identify some effective interviewing techniques.



JOB AID

ITN labels and packaging¹²

PermaNet Label



PermaNet Package



Dawa Label



Dawa Package



Malaria Health Net packaging and labels



DYO - NET Label



¹² Example adapted from Nigeria. This job aid **must** be customized for each survey.

Session 6

Conducting the interview (Part 2): interview tips and techniques

Overall goal	Acquire the skills and knowledge to conduct an effective interview
Objectives	By the end of this activity, participants will be able to: <ul style="list-style-type: none"> • identify the attitudes, skills and behaviours associated with conducting an effective interview
 Time	40 minutes
Methods	Small group discussion, posting ideas, large group discussion/debriefing
Materials/ preparation	<ol style="list-style-type: none"> 1. Prepare a flipchart with instructions for the activity. 2. Prepare a flipchart for capturing the results of the small group work (one with heading “Things to do/good ideas”, and the other with the heading “Things to avoid”). 3. Paper or note cards and tape. 4. Laptop with LCD projection (to capture results of the activity) (optional). 5. Print one copy of the handout “Effective interviewing techniques” for each participant.
Steps	<p>1. Factors that affect the interview/conducting the interview (30 minutes)</p> <p>1.1 Tell the participants that the household interview is a very important activity of this survey. <i>Say: The interview is an activity that is central to the survey, and it is during the interview that the data are collected. The quality of the data collected depends on many factors, and the interviewer plays a very important role during the interview. It is essential that everyone has good interviewing techniques, and conducts the interview well. The hope is that the response rate will be high, that is, that very few households refuse to participate in the survey and that the interview is carried out successfully.</i></p> <p>1.2 Divide the participants into small groups. <i>Say: Your task is to identify factors that help to make a good interview, and those attitudes and behaviours that an interviewer should avoid.</i></p> <p>1.3 <i>Say: In your small group, identify the following: At least two factors that can help to have an effective interview, and two things that a “good interviewer” does not do during an interview or two things to avoid. Be as precise as possible. Make sure to record your results. You can use one card to write down the “Things to do” and another to write down the things “To avoid”.</i> Tell the participants that they have 15 minutes to complete the exercise.</p> <p>1.4 When the time is up, bring the participants back together. Make a round of the room, and ask one group to name just one factor that they identified as being a good thing to do for the interview. Go to the next group for different ideas. As you go from group to group, ask for only new points to be added. Continue with this process until all the ideas have been provided. Repeat this procedure for the things to avoid during an interview.</p> <p>Ask participants to post their cards on the prepared flipchart.</p>

As an alternative to writing down the results on cards, the group feedback can either be written onto flipcharts as the ideas are raised or the feedback can be entered directly to a laptop and projected in front of the room. Some ideas that might be raised may include:

Things to do/good ideas:

- Be organized
- Understand the questionnaire fully
- Greet the person(s) when you first approach the household
- Build rapport
- Introduce yourself politely
- Go over the consent form to get informed consent from a capable adult member of the household
- Be polite and cheerful
- Explain the use of the mobile phone in this survey
- Ensure data entry of the correct assigned cluster number and household number
- Be respectful
- Listen carefully
- Be patient
- Ask questions as they are written in the questionnaire
- Ensure that the respondent understands that the questions pertain to the correct campaign
- Use the job aids, as they can help explain the meaning of a question or aid in probing the response
- Be neutral throughout the interview
- Speak clearly and not too quickly
- Listen carefully and remember what was said
- Handle hesitant respondents thoughtfully
- Dress in an appropriate way
- Adapt to the local culture
- Tell your team supervisor if a problem was encountered
- Make a note if a data entry error has been made and tell your supervisor
- Thank the respondents for their time and remind them that every person in the household should sleep under a LLIN every night

Things to avoid:

- Do not carry out the interview in presence of other people (e.g., Red Cross Red Crescent volunteer, neighbours, the team driver, etc.)
- Do not interrupt the person
- Do not anticipate the response(s). Never suggest answers to the respondent
- Do not change the wording or the sequence of questions
- Do not be offensive
- Do not make promises or create expectations
- Do not criticize
- Do not react if an answer is not what you expect
- Do not be authoritarian
- Do not drink alcohol
- Do not smoke
- Do not chew gum or confectionery
- Do not act as if this is a police enquiry
- Do not speak about politics

2. Comparing their feedback with that of experts (10 minutes)

2.1 Hand out copies of “Effective interviewing techniques”. Ask a participant to read out loud all the points on the handout. Point out if there are any differences between this list of techniques and the work generated by the small groups.

- 2.2 Explain that this list concentrates on techniques for conducting the interview, and that besides these, there are other aspects that contribute to an effective interview. These techniques, alongside the other factors mentioned during the small group work, all contribute to an effective interview. Encourage them to refer to this list when in the field to remind themselves of effective interviewing techniques. Emphasize that for all interviews it is essential to obtain consent before conducting the interview.
- 2.3 State that you hope this activity has helped them to understand that there are a number of factors that can affect an interview, and that many of these attitudes, skills and behaviours are under their control. These factors can either help to achieve an effective interview, or can lead to a less-than-successful interview.
- 2.4 Thank the participants for their effort on this activity, and say that they will soon have the chance to try out these techniques. There will be a session on *“Interviewing skills practice”*, and the *“Field practice”* coming up soon.



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HANDOUT

Effective interviewing techniques¹³

1. Introduce yourself, your organization, and the purpose of the survey (show document or letter if necessary).
2. Maintain confidentiality. Do not interview the respondent in the presence of others (unless he/she indicates otherwise). Explain that all answers will be kept confidential.
3. Ask questions exactly as written.
4. Wait for a response; be silent, then follow up if necessary.
5. If the respondent does not understand or the answer is unclear, ask the question again, making as few changes in wording as possible. Do not violate the intent of the question.
6. Do not suggest – by tone of voice, facial expression, or body language – the answer you want.
7. Do not ask leading questions, questions that signal the correct answer or suggest the answer you would like.
8. Try not to react to answers in such a way as to show that you approve or disapprove.
9. If one answer is inconsistent with another, try to clear up the confusion.
10. Try to maintain a conversational tone of voice; do not make the interview seem like an interrogation.
11. Know the local words for sensitive or delicate topics.

¹³ *Roll Back Malaria (2012), Malaria Indicator Survey: Basic Documentation for Survey Design and Implementation. Interviewer's Manual. See: www.who.int/malaria/publications/atoz/9241593571/en/index.html.*

Session 7 **Conducting the interview (Part 3): interviewing skills practice**

Overall goal	Acquire the skills and knowledge to conduct the household interview
Objectives	By the end of this session, the participants will be able to: <ul style="list-style-type: none"> • conduct an interview with confidence and skill, following the guidelines and procedures given during the training
 Duration	95 minutes
Methods	Trainer-led data entry based on a household scenario, small group role-play, large group discussion and debriefing
Materials/ preparation	<ol style="list-style-type: none"> 1. Review and adapt the sample case scenarios for households. Print one copy of the “Sample case scenarios: interviewing skills practice” for each participant. Write key information for each household scenario on flipcharts. Other case scenarios can be developed by the survey coordinator or trainer if desired. 2. Print one copy of the “Case scenarios: interviewing skills practice: trainer’s debriefing notes” for each trainer. 3. Print copies of the job aid “Persons roster and who slept under which net last night” in sufficient quantities for the chosen scenarios.
Steps	<p>1. Case scenarios: interview skills practice (80 minutes)</p> <ol style="list-style-type: none"> 1.1 Begin the session by telling the participants that each person will have time to practise the household interview and further improve their interview and data entry skills. There is a new batch of sample households to survey with prepared scenarios that describe the household. Participants will have the chance again to carry out a role-play but this time to work with a small group to enter data on the basis of the information given in the scenarios. 1.2 It can be expected that the participants may need to have more practice and reinforcement of learning regarding the use of the interviewer job aid and the completion of the persons and the net rosters. Lead a plenary in which all participants complete scenario 1 under the guidance of the trainer. The participants can be asked to read the questions out loud. They can be instructed to enter data for all three questionnaires, or can do this only for the persons and the net rosters. For ease of referring to the information, it can be helpful to write the content of the job aid on a large flipchart. 1.3 Depending on the time taken to go through scenario 1, it may be possible to ask participants to divide themselves into small groups of three to six people to undertake a role-play of a different scenario. Take language of the survey into account when forming the groups. 1.4 In each group, ask participants to identify one person to act as the interviewer and one to act as the respondent. <p>After an interview is over, they should switch roles so that other people get the opportunity to practise being the interviewer. The role-play provides an opportunity for the participants to become familiar with the questionnaires from both sides of the interview, that is, from the point of view of the respondent and of the interviewer.</p>

As the actors carry out the role-play, the others in the group will follow along, listen carefully to the interview, and enter data according to the responses given by the respondent.

Say: A set of four (4) scenarios that describe households has been prepared. We have worked on scenario 1 together. Your group may not have the time to complete an interview for each of the other scenarios, but it should have the time to complete at least one. Choose a scenario to work on, but do not spend a lot of time making your selection: one minute at the most.

Alternatively, the case scenarios can be chosen by the trainer and assigned to the groups. The groups can be assigned the same scenarios or different ones.

Once each group has decided on its role-play scenario, ask one person from each group to read the scenario out loud. Give the actors two to five minutes to read the scenario carefully, settle into position and prepare for the role-play exercise. They might like to add some details to the scenario (such as the names and ages of the household members). Encourage the participants to run through the entire interview without many interruptions, as far as possible. This will give them the chance to practise data collection and to carry out an interview that flows well. The main information points for each scenario can be written on a flipchart so that all members of the group can more easily recall the specifics of the scenario they are using.

- 1.5 Explain that you will walk around to observe. If there are any questions or problems, the trainee should raise his/her hand and you will come over to help.
- 1.6 Walk around and observe the groups during the role-plays. Observe the data entry and ensure that all participants are using their mobile phones correctly to enter data. Check to ensure that the small groups continue with a new scenario once the previous one has been completed, and that the group members switch roles.
- 1.7 Explain that they have around 40 minutes to carry out the role-plays and enter data for a scenario(s), and that when the time is up you will reassemble the whole group, and debrief each of the scenarios. When everyone gathers together as a whole group you will be asking for a report from each group.
- 1.8 Before the small groups begin their work, ask if there are any questions about this activity.
- 1.9 Give a two minute warning signal for the groups to terminate their activity. After 40 minutes, ask everyone to reassemble.
- 1.10 Starting with case scenario 2, request a person from a group that carried out a role-play on this sample household to report on their experience. In the report, ask each group:
 - ↳ *What challenges were encountered in the role-play of this scenario?*
 - ↳ *What did you learn from doing this interview?*
- 1.11 Ask if there are any additional comments from any other members of the group and from the whole group. Summarize the key messages for that case scenario, referring to the trainer's debriefing notes. Continue this procedure for each of the case scenarios. If a case scenario has not been role-played, then summarize the scenario and present the key messages for that scenario.
- 1.12 This exercise provides an opportunity for the trainers to review the performance of the participants. To do this, the mobile phones would need to be collected, and the data entered by each person reviewed by the trainers. The data would be checked keeping in mind factors such as: Have the correct cluster and household numbers been entered? Have the data been correctly entered? Has the person

entered data for the entire interview? If possible it would be ideal to arrange to review the data during the day so that if decided, the participants can take the mobile phones with them at the end of the training day. If the data are reviewed by the trainers, then it will be important to provide feedback to the participants based on this review. If the phones are given to the participants to take with them at the end of the day, encourage them to complete data entry for at least one other case scenario as homework. They can do this on their own or enlist a person to serve as the respondent.

2. Wrap-up and review (15 minutes)

- 2.1 Ask if anyone has any questions or comments about the topics covered so far in the training. Carry out a brief review of the topics related to the questionnaire, its administration and the interview. This can be done orally, or, alternatively, a review quiz can be administered.
- 2.2 Thank everyone for their participation and hard work so far, and tell the participants that the next sessions will focus on fieldwork procedures.



HANDOUT

Sample case scenarios: interviewing skills practice

Case scenario 1

Cluster number 14, household number 3

This family is very poor, and lives in a mud brick house in a rural area of the district. This household is composed of the household head Mathew Ugorika who is 33 years old, his wife Esther who is 25 years old, the man's mother, Mama Eko (she thinks she is about 65 years old), and the couple's two children. There is a daughter, Shireen, who is four years old, and a son, Samuel who is two years old. The household owns three mosquito nets, all LLINs. Two of the LLINs were received during the last mass campaign, held four months ago. A LLIN is hanging over the sleeping space where the parents sleep with Samuel. It is a Permanet brand that Esther received during the last mass campaign. Esther has the card that she received during that campaign, and it shows that the family received two LLINs. The second LLIN (Permanet brand) is hanging in another room, where Mama Eko sleeps with the couple's four year old daughter, Shireen. The third bed net is also a LLIN (Dawa brand). It is in its original packaging, stored in a cupboard and being kept for the future. This net was received about a year ago at the local health clinic during Samuel's immunization visit.

As part of the mass distribution campaign, Red Cross volunteers visited the family, told them about the dangers of malaria and hung up the two nets that were distributed to the mother.

In the last two weeks, Samuel had a high fever. Within 24 hours of the onset of fever, his mother took him to the local health facility where he was tested for malaria and given an anti-malarial drug (ACT). The nurse told the mother that Samuel had malaria, stressed that malaria is a serious health problem and that it is important for him to take the medicines as prescribed. She stressed too that Samuel and all other family members should always sleep under an insecticide-treated bed net.

The interviewer job aid *Persons roster and who slept under which net last night* has been partially completed for this household and is provided on the next page.

Persons roster and who slept under which net last night

Cluster number:

1

Household number:

3

Date: *Nov 12*Interviewer: *J. Lukpati*

Part A: To be completed BEFORE the persons roster questionnaire on the phone.

*Only record the names of people who slept in the household the previous night. This should NOT include all family members (if one of them slept somewhere else) and it CAN include people who are NOT family members (e.g., friends, temporary visitors or domestic servants).

*Start with the head of the household. If the head of the household DID NOT sleep here last night, start with the oldest person.

Person number	Name
1	<i>Matthew Ugorika</i>
2	<i>Esther</i>
3	<i>Shireen</i>
4	<i>Samuel</i>
5	<i>Mama Eko</i>
6	
7	
8	
9	
10	
11	
12	

Part B: To be completed BEFORE the net roster questionnaire on the phone. *Write the person number from above into their box below. We want to know which people slept under which net last night. For each net, list the name and person number that slept under each net last night (moving down the column).

Net 1 Description of net (memory device only) <i>Permanet (parents' room)</i>	Net 2 <i>Dawa Clinic</i>	Net 3 <i>Permanet (Mama's room)</i>	Net 4	Net 5
Name: <i>Mathew</i>	Name:	Name: <i>Mama Eko</i>	Name:	Name:
Person number: <input type="checkbox"/>	Person number: <input type="checkbox"/>	Person number: <input type="checkbox"/>	Person number: <input type="checkbox"/>	Person number: <input type="checkbox"/>
Name: <i>Esther</i>	Name:	Name:	Name:	Name:
Person number: <input type="checkbox"/>	Person number: <input type="checkbox"/>	Person number: <input type="checkbox"/>	Person number: <input type="checkbox"/>	Person number: <input type="checkbox"/>
Name: <i>Samuel</i>	Name:	Name:	Name:	Name:
Person number: <input type="checkbox"/>	Person number: <input type="checkbox"/>	Person number: <input type="checkbox"/>	Person number: <input type="checkbox"/>	Person number: <input type="checkbox"/>
Name:	Name:	Name:	Name:	Name:
Person number: <input type="checkbox"/>	Person number: <input type="checkbox"/>	Person number: <input type="checkbox"/>	Person number: <input type="checkbox"/>	Person number: <input type="checkbox"/>

Case scenario 2

Cluster number 28, household number 9

In the urban compound that you visit, you find that there are three young men who live there. Each of them comes from far away to attend university in town. They cook and eat together and share the responsibility of taking care of the lodging. There are two bed nets in the household, one is a LLIN and one is an untreated net that was bought at the market. One net (the untreated one) is hanging, and the LLIN is still in its packaging. The respondent tells you that he received it from his mother who had an extra one and encouraged him to take it. He says that his roommate sleeps under the other net, every night.

Case scenario 3

Cluster number 16, household number 10

In this rural household, there are eight people who slept here last night. The head of the household is A¹⁴ (36 years old), and his wife is B (31 years old). They have four children: three daughters – C (8 years old), D (6 years old) and E (4 years old) and a son F (2 years 3 months old). A's widowed sister, G (22 years old) also lives with them, and she has a baby boy, H (5 months old). She had the boy at the local health facility which is eight kilometres from their home. There are three sleeping spaces in the household. There is no electricity in the home. The father owns a bicycle. The family members own some land and they grow crops for the family to eat and also sell at the weekly market. The family gets water for drinking and cooking from the public well. The field is used as a toilet facility. The flooring in all the rooms is dirt.

Of the two under-five year old children in this household, the 4 year old daughter had a fever last week. Her mother gave her aspirin the day that the fever started, and the girl felt well the next day.

There was a mass LLIN distribution campaign 10 months ago. B and G both went to the fixed post where nets were being distributed. B received two LLINs for her family. G received one net. They were Dawa brand. The sister-in-law also received another LLIN-Permanet brand when she visited the health clinic during her pregnancy for antenatal care services.

The couple sleeps in one room with their 2 year old son, and their three daughters sleep in another room. The sister-in-law sleeps with her son in the same room as the three girls. The three LLINs received from the mass campaign were hung last night, and all the household members slept under a net last night. The fourth net (the one received from the health facility) is still in its packaging, and has not yet been used.

Case scenario 4

Cluster number 17, household number 6

You are surveying households in a rural area and have obtained permission to carry out the interview at one household. You find that there are five people who usually live in the household. The household is composed of a couple, AA (27 years old) and his pregnant wife, BB (23 years old). They have two children,

14 If wished insert a name for each of the people in the case scenarios, or ask participants to do so.

a son CC (2 years and four months old) and a daughter, DD (3 months old). AA's father EE lives with them, and he is over 60 years old. AA is not at home now and did not sleep at home last night. He works in town and will be back at the weekend.

The household is two kilometres from the health facility. There are three sleeping spaces that were used last night. The main source of drinking water is the piped water in the residence and there is a flush toilet. The flooring is ceramic tile and the roof is made of corrugated iron. There is a main living area, a separate kitchen and three rooms for sleeping. There is a large shed outside the dwelling and the family car is parked just in front of it. Four days ago, the son had a high fever. The mother decided to wait and see if the fever would go away. The fever persisted and the boy became more ill, so the mother took the boy to the clinic yesterday. At the clinic, the nurse tested the boy for malaria and then gave a medicine to the mother. The drug was an ACT.

There are three bed nets that are owned by the household. There was a mass LLIN distribution campaign in the state six months ago. Free LLINs were distributed to all families, up to a limit of two nets per household. The household received two LLINs, of the Olyset brand. The family also received a free LLIN (Permanet brand) during the national campaign that took place over three years ago. The old man sleeps under one of the LLINs received in the most recent campaign, and BB sleeps under the other recent LLIN with her 3 month old daughter. CC sleeps on a mat beside his mother, but does not sleep under a net. The third net is stored under the mother's mattress and has not been used recently because it was starting to have many large holes.

**TRAINER'S
NOTE****Sample case scenarios:
Interviewing skills practice****Trainer's debriefing notes****Case scenario 1**

- Free mosquito nets can be distributed during mass campaigns in which only a net is given out. In some campaigns though, the campaign is an integrated health campaign, in which a number of interventions are provided (e.g., free bed net, measles or polio vaccinations to children under five years of age, vitamin A, de-worming).
- It is important to be familiar with the types (brands) of nets distributed during the campaign, and distributed through the routine health services, such as during antenatal care.
- Often, there is a record that a bed net has been distributed either during a campaign or during the routine services. This could take the form of a campaign card, the child's health card, the immunization record, and so on.
- The interviewer job aid is an essential tool for the interviewer. The aid is used to list all the members of the household and any non-family members who slept in the household last night. The person line number is then used for entering data when completing the persons roster, and the net roster, using the mobile phone.
- When completing the persons roster, the interviewer must take care to ensure that the correct person line number is entered, and that all persons that slept in the household last night are captured when completing this roster.
- A potential data entry error is the same person being entered by the interviewer as sleeping under more than one net last night. The interviewer must be careful to ensure that this data entry error does not happen.
- If the respondent does not give permission to enter the home and view the bed net then the pictorial job aid that illustrates the brand of ITNs in the survey area can be helpful. If the brand is unknown and you cannot observe the net, show the pictures of typical net brands to the respondent.

Case scenario 2

- Household composition can vary a great deal. This **is** an example of a household. Why? Because the young men have combined to form a multi-person household. They buy food and eat together. If they each had separate arrangements for cooking and eating, then this would have been an example of three one-person households within the dwelling.

- Remember, the goal is that all people in a household sleep under an ITN, not just women and young children. So we would like to see the young men owning ITNs and sleeping under them every night
- Since there are no under-five children in this household, the persons roster questionnaire is completed fairly quickly, and after the data are collected for the third man the skip pattern brings the interviewer to the last question in the questionnaire.

Case scenario 3

- It is important to know what the healthcare policy is regarding the distribution of LLINs during antenatal care services. Usually, if a LLIN is given to a pregnant woman, this is during her first visit (the normal target is that a pregnant woman should make at least three prenatal care visits).
- If a bed net is reported as having come from the campaign, and you have not been given permission to observe the net, you can record this as a LLIN. If you are not given permission to go into the bedroom or area where the bed nets are hanging, do not persist. You enter the data on the basis of the reporting given by the respondent. In this case, the respondent has told you that both nets were hanging and were used for sleeping under last night.
- The health card can often provide proof that the LLIN was received during the last campaign.

Case scenario 4

- The old man gave permission to carry out the interview, but the pregnant daughter-in-law is in a better position to provide accurate information about the bed nets and care of children in the family. It is acceptable that the household head who is a man gives informed consent for the interview and that his wife (or other female adult in the household) be the respondent for the interview.
- In this family, the father did not sleep there last night so he should not be included on the persons roster.
- The child that had fever was treated with ACT but not within 24 hours. The timing of the treatment is very important and the data entered must reflect the answer that the mother gives during the interview.
- All bed nets owned by the household need to be counted and included when completing the net roster. So, even if a bed net is not being used (as in this example, where the net was old and was still being kept in the household for possible use) it needs to be counted.

Some general remarks

- Know who is eligible to be a respondent for this survey. The respondent should ideally be a person who is knowledgeable about the information being collected in the survey. Generally, this would be a woman, since often it is the woman who takes care of the children and who may be the one who goes to the distribution sites when LLINs are being distributed during mass campaigns.

- Keep the definition of the household in mind, and make sure that you apply it when selecting the household to be surveyed. All households should be on the list from which households are selected to be interviewed. This gives every household a chance to be selected and this will be done by simple random sampling (see session 9, Fieldwork procedures).
- Take time when first approaching the dwelling to gather information that can help you to understand the family structure and living arrangements and verify that you are visiting a single household. It is possible that more than one household lives in a dwelling. If your team has obtained the help of a local guide or authority, that person may be able to help identify if there are some dwellings in which more than one household lives (and this information should have been used when your team maps the cluster (see session 9, Fieldwork procedures).
- Do not read out loud the labels that may appear on the survey questionnaire. These are not questions and are not meant to be asked to the respondent.
- It is important to pay attention during the interview. This can help in many ways such as ensuring a smooth interview flow, showing respect for the respondent, and picking up any inconsistencies in information provided by the respondent. If a household asset is owned but is not in working order, then do not consider this as an asset (e.g., an old car that is clearly not in working order in the yard, a refrigerator that is lying about outside in a state of total disrepair, etc.).
- When entering the names of individuals in the persons roster it is not necessary to add their surname for all persons. Make sure that the surname is entered for the head of the household/respondent, and for any others that have a different surname. This can help to reduce the time needed for data entry when completing this part of the interview.
- While it is ideal to be able to see the net(s) hanging in a household, this may not always be possible. When this happens, remain polite and do not insist on going into areas where you have not been given permission. In some cases, if you ask if the bed net can be brought out to you to view, the respondent might comply.
- It is important to be familiar with the types and brands of nets used in the campaign and the ITNs available through the routine health services and, in general, in the country/district.
- Ensure that the respondent understands the response options, and if asking about the source of a net that their response relates to the right campaign.
- Keep in mind the purpose of this interview. If the respondent needs information or education about the care and repair of bed nets, briefly share your knowledge at the end of the interview but do not shift this session into an educational visit or a demonstration of how to hang their bed net. You can report special needs or situations to your supervisor after the interview is ended.
- Always thank the respondents at the end of the survey and remind them that each member of their household should always sleep under an ITN to be protected from malaria.

Session 8 **Fieldwork procedures (Part 1): key steps and activities**

Overall goal	To develop skills, attitudes and behaviours necessary for carrying out the survey following the correct field procedures
Objectives	By the end of this session, participants will be able to: <ul style="list-style-type: none"> • identify and correctly describe the key steps and activities for survey fieldwork • describe the main responsibilities and tasks of the supervisor and the interviewers
	80 minutes + 20 minutes optional activity
Methods	Presentation, large group discussion, sequencing of field procedures activity (optional)
Materials/ preparation	<ol style="list-style-type: none"> 1. Sample PowerPoint presentation “Fieldwork procedures: key steps and activities” (optional). Some of these slides are to be used in session 9: Fieldwork procedures (Part 2). 2. Review the full PowerPoint presentation and the various fieldwork forms and tools that are mentioned. 3. Laptop, LCD projector and screen (optional). 4. Review the trainer’s note “Field survey team responsibilities”. 5. Prepare flipcharts with content on “Supervisor: responsibilities/tasks” and “Interviewer: responsibilities/tasks”. 6. Write the “Fieldwork key steps and activities” (as per the content on the sample PowerPoint slides) on flipcharts. To be used only if the PowerPoint presentation is not projected. 7. For the sequencing of field procedures activity (optional), prepare a set of cards for each small group that specify survey steps and activities. 8. Prepare a flipchart with the “Sequence of steps and activities” in the order given on the master form for the sequencing of field procedures activity. 9. Print one copy of the trainer’s note “Field survey team responsibilities” for each trainer. The trainer should review this information and keep it in mind when facilitating discussion about the supervisor’s and interviewer’s responsibilities and tasks.
Steps	<p>1. Introduction</p> <p>Introduce this session by telling the participants that the survey will only be successful if each member of the survey team understands and follows correct procedures. Over the next few hours, the focus will be on fieldwork: they will learn about, and have the chance to discuss some of the main steps, activities and processes involved in the survey. They will learn more about their role in the survey and their main responsibilities and tasks. Very soon they will start to apply some of what they learn when they do the field practice sessions.</p> <p>2. Presentation on survey fieldwork: key steps and activities (60 minutes)</p> <p>2.1 Using the set of PowerPoint slides, outline and describe the key steps and activities for surveys in the field. (This presentation can also be given without using the laptop/LCD projector. Instead, the content of the slides can be written onto flipcharts.) The slides that address details regarding how to segment and list households (slides 8 to 15 and 23) should be shown and discussed in more detail in the next session (session 9, Fieldwork procedures, part 2).</p>

- 2.2 Let the participants know that, following the presentation there will be some activities that will enable them to explore in more detail these field procedures, especially how to select households to be interviewed (this is the focus of the next session, session 9).
- 2.3 Use an interactive technique when going through the slides: ask questions, test for understanding and draw upon the experience of the participants.
- 2.4 Refer, as needed in this session, to the trainer's note "Survey team responsibilities" to provide information about the responsibilities and tasks of the drivers and the local guides and translators.
- 2.5 Respond to any questions.

3. Responsibilities of the survey team (15 minutes)

- 3.1 Post the flipchart of the responsibilities/tasks of the supervisor and inform the participants what these are. Emphasize the unique responsibilities and some of the main tasks that a supervisor has while in the field. Then, post the flipchart of the responsibilities/tasks of the interviewers. Ask if anyone has questions or comments about the responsibilities and tasks of the supervisor or the interviewers. Respond to questions and clarify information.

Supervisor: responsibilities/tasks

- Be main link between the field survey team and the survey coordinator
- Introduce the survey to local authorities, getting their support and cooperation
- Take lead in segmentation
- Distribute workload for interviews
- Ensure quality of data collected (includes observing interviews)
- Ensure data are sent to server
- Review and edit data (if assigned by the survey coordinator)
- Submit required forms to the survey coordinator
- Ensure safety of team members
- Manage financial and material resources
- Maintain team motivation and morale
- Troubleshoot

Interviewers: responsibilities/tasks

- Conduct interviews in the households (HHs) assigned to you
- Collect data, following the correct field procedures
- Report to the supervisor challenges or problems that arise
- Send data to the server
- Take care of equipment assigned to you
- Contribute to maintaining team morale

4. Small group exercise (optional): sequencing of fieldwork procedures (20 minutes)

- 4.1 Introduce this exercise by telling the participants that we have just had a presentation and discussion about fieldwork procedures, and will now give them the chance, in small groups, to review these steps and activities.
- 4.2 Divide the participants into small groups. Distribute one set of sequencing-cards to each small group.
Say: Each group has received a set of cards that contains many of the key steps and activities that you will need to carry out while doing the survey in the field. Your task is to place the steps and activities for working in the field into the correct order.
 Allow 10 minutes for the groups to do the activity.

4.3 When the time is up, reassemble the participants into the whole group. Ask: *How did you find this exercise? Was it easy or difficult to do? Did you encounter any challenges?* Then, ask for a volunteer to provide the sequence of steps and activities that their group came up with. Ask if the other small groups came up with the same sequence.

4.4 Post the flipchart with the correct sequence of steps and activities. Point out if there are any differences between this correct sequence as shown on the pre-prepared list and the sequence generated by the small group that just reported. Ask for a volunteer to explain certain of these steps or activities: for example, contact with local authorities, sketch map of the cluster, segmentation.

Variation: this activity can instead be done as a recap exercise later in the training, helping to review the content, test for understanding and reinforce the key messages.

Sequence of steps and activities

See the complete list of steps and their correct sequencing on the master form for the activity, next page.

4.5 Thank the participants for their effort on this activity, and say that they will soon have the chance to carry out many of these steps during the field test coming up very soon.

5. Wrap-up (5 minutes)

Review the day's work and highlight how the group has achieved the learning objectives. A quick exercise such as a true/false quiz, or a fun, competitive game testing for learning can be carried out (to be designed by the survey coordinator or trainer).



**ACTIVITY
(OPTIONAL)****Sequencing of field procedures**

Instructions for the trainer

1. Using the master form (see below), print one copy for each small group. (Before doing this, the font size of the text could be increased, as desired.) It would be ideal if a heavier weight paper could be used.
2. Cut each sheet of paper into pieces, separating out each step or activity by cutting it away (these are the “cards” for the activity).
3. When all are separated, collect all the cards for each sheet, mix them up, and place each full set of steps/activities into an envelope.
4. Distribute one set to each small group after the small groups have been formed for the exercise.

Master form

The correct sequence of the step, activities and processes are listed on the master form and are as shown below. ✂

- Obtain area and cluster maps
- Charge your mobile phone
- Travel to the area where your assigned cluster is located
- Contact the local authorities
- Recruit a local guide/translator
- Decide if the cluster needs to be segmented
- Create *Sketch map type 1*: a sketch map of the cluster to create segments
- Select a segment
- Create *Sketch map type 2*: a sketch map of the selected segment with all households numbered
- Randomly select the households to be surveyed
- Decide which households each team member will interview
- Go to the selected households
- Carry out the interviews
- Report any problems or data quality issues to your supervisor
- Send data to the server
- Contact the survey coordinator to provide a status report
- Discuss the plan for the next assigned cluster with your team

HANDOUT*

Slide 1



Slide 2

A presentation slide with a dark grey background. In the top left corner, there is a red circle containing the word 'RAMP'. The title 'Learning objectives' is in white. Below the title is a bulleted list of four objectives. At the bottom, there is a red footer bar containing the website 'www.ifrc.org' and the slogan 'Saving lives, changing minds.' on the left, and the International Federation of Red Cross and Red Crescent Societies logo on the right.

- Describe the main steps and activities in carrying out the fieldwork
- Describe the procedures used to select households to be interviewed (including segmentation if needed)
- Apply correctly the field procedures when carrying out the survey
- Respond correctly to special considerations and challenges commonly faced in the field

Slide 3

A presentation slide with a dark grey background. In the top left corner, there is a red circle containing the word 'RAMP'. The title 'Travel to the assigned area' is in white. Below the title is a bulleted list of three points. At the bottom, there is a red footer bar containing the website 'www.ifrc.org' and the slogan 'Saving lives, changing minds.' on the left, and the International Federation of Red Cross and Red Crescent Societies logo on the right.

- The clusters for the survey have been selected. Each team will be assigned the clusters to survey
- Use the transport provided
- Use your maps to help find the locality and cluster
- Safety and security are

Slide 4

A presentation slide with a dark grey background. In the top left corner, there is a red circle containing the word 'RAMP'. The title 'Key steps' is in white. Below the title is a numbered list of six steps. At the bottom, there is a red footer bar containing the website 'www.ifrc.org' and the slogan 'Saving lives, changing minds.' on the left, and the International Federation of Red Cross and Red Crescent Societies logo on the right.

- 1 Contact the local authorities
- 2 Select households to be interviewed
- 3 Plan your path for visiting the selected households
- 4 Approach the selected households to obtain consent for the interview
- 5 Conduct the interviews
- 6 Wrap-up in the cluster/area

* This has been prepared as a PowerPoint presentation, but may also be printed as a handout for the participants (format and number of slides per page to be determined by the trainer). The PowerPoint version of the slides may be downloaded from the RAMP website (www.ifrc.org/ramp).

Slide 5



1 Contact the local authorities

- Present your letter of introduction
- Local leaders can:
 - provide information about the community
 - provide information about the number of households
 - help prepare the sketch maps
 - provide a guide or translator

Slide 6



Contact with local authorities

- What are some ways to facilitate your team's contact with local authorities?
Activity:
 - Turn to your neighbour
 - In pairs, identify at least one way to facilitate your team's contact with local authorities
 - Time: 5 minutes



Slide 7



2 Select households to be interviewed

Your team will:

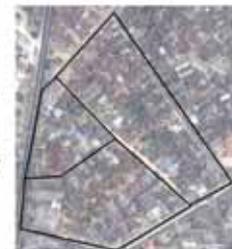
- Locate the village/cluster assigned to your team
- Decide if the area needs to be segmented
- If segmentation is needed:
 - draw a rough map of the area (may need to segment, or sub-segment) if area is too large
 - select one segment (use the Segment Identification tool)
 - draw a detailed map of the selected segment showing all houses in the chosen segment
- Randomly select 10 households to be interviewed

Slide 8



Deciding if area needs to be segmented

- Will you map and list all the households in the cluster?
 - or
- Do you need to break this area down into smaller segments (parts) and then map and list all the households in that segment?
- The decision depends on the size of the cluster!



Slide 9



How to map, segment and list households: stages

- Stage 1: Create segments
 - prepare a sketch map of the cluster (or the (sub)-segment)
 - divide the area into segments, using natural boundaries (streams, roads, fields, etc.) to create the segments
 - indicate the estimated number of households in each segment
- Stage 2: Choosing one segment
- Stage 3: Mapping the chosen segment and randomly selecting households to be interviewed
 - for malaria surveys with 10 households per cluster to be surveyed, segments should have approximately 15-20 households
 - map the area and number households consecutively
 - randomly select 10 households from all the households

Slide 10



Stage 1: Segmentation

- Prepare a rough sketch map of the cluster
- Divide the area into segments, using natural boundaries (streams, roads, fields, etc.)
- Indicate the estimated number of households in each segment



Slide 11



Stage 2: Choosing one segment

- Use the *Segment identification tool* to choose one segment
- The households to be interviewed will come from that selected segment

Segment identification form					
Type one household out of the segment/cluster. Randomly select one (1) household.					
Household number	Number of people in household (or other indicator)	Sex	Education	Occupation	Segment/cluster selected (mark with 'X')

Slide 12



Choosing a segment: an example

Segment identification form					
Type one household out of the segment/cluster. Randomly select one (1) household.					
Household number	Number of people in household (or other indicator)	Sex	Education	Occupation	Segment/cluster selected (mark with 'X')
1	Segment 1	22	25		
2	Segment 2	35	25		
3	Segment 3	25	110		X
4	Segment 4	19	110		
5	Segment 5	19	110		

Use the *Segment identification form* to identify one segment during the process of breaking down a cluster

Slide 13

Prepare sketch map of sub-segment (if needed)

- Use natural boundaries and landmarks
- Estimate number of houses in each sub-segment

Slide 14

Choosing a sub-segment: an example

Segment identification form					
Find one dominant household in each sub-segment					
Randomly select one sub-segment					
Sub-segment	Number of households in sub-segment	Number of households in cluster	Number of households in sub-segment	Number of households in cluster	Number of households in sub-segment
1	10	20	10	20	X
2	10	20	10	20	X
3	10	20	10	20	X
4					
5					

Use the Segment identification form to identify one sub-segment during the process of breaking down the cluster

Slide 15

Stage 3: Mapping the chosen (sub) segment and randomly selecting households to be interviewed

- Map all the houses in the segment
- Number each household
 - each household needs to be numbered from 1 to the total number of houses in the segment
- Randomly select households from all the households in the (sub)segment

Slide 16

Mapping and numbering households: an example

Slide 17



Random selection of households in the chosen segment

- Randomly select 10 households to be interviewed
- Use a random number table to select the households
- Re-number the households 1 to 10 (using the tool *List of households for random sampling*)

Slide 18



Re-numbering the selected households

Example List of households for random sampling

Cluster ID	Household ID	Household Name	Household Type	Household Status
1	1	1	1	1
1	2	2	1	1
1	3	3	1	1
1	4	4	1	1
1	5	5	1	1
1	6	6	1	1
1	7	7	1	1
1	8	8	1	1
1	9	9	1	1
1	10	10	1	1
1	11	11	1	1
1	12	12	1	1
1	13	13	1	1
1	14	14	1	1
1	15	15	1	1
1	16	16	1	1
1	17	17	1	1
1	18	18	1	1
1	19	19	1	1
1	20	20	1	1
1	21	21	1	1
1	22	22	1	1
1	23	23	1	1
1	24	24	1	1
1	25	25	1	1
1	26	26	1	1
1	27	27	1	1
1	28	28	1	1
1	29	29	1	1
1	30	30	1	1
1	31	31	1	1
1	32	32	1	1
1	33	33	1	1
1	34	34	1	1
1	35	35	1	1
1	36	36	1	1
1	37	37	1	1
1	38	38	1	1
1	39	39	1	1
1	40	40	1	1
1	41	41	1	1
1	42	42	1	1
1	43	43	1	1
1	44	44	1	1
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1	46	46	1	1
1	47	47	1	1
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1	87	87	1	1
1	88	88	1	1
1	89	89	1	1
1	90	90	1	1
1	91	91	1	1
1	92	92	1	1
1	93	93	1	1
1	94	94	1	1
1	95	95	1	1
1	96	96	1	1
1	97	97	1	1
1	98	98	1	1
1	99	99	1	1
1	100	100	1	1

Slide 19



3 Plan your path for visiting the sample cluster

- Decide how your team will distribute the work
 - Who will go where?
 - How many interviews will each person have to complete?
 - What will you do if no one is at home?
- Distribute work fairly
- Agree on a meeting place post-interviews

Slide 20



4 Approach the selected households

- The respondent's first impression of you can influence their willingness to participate in the survey
- One of your main tasks is to establish rapport
- Introduce yourself
- Always have a positive approach
- Use the prepared script to obtain consent

Slide 21



5 Conduct the interviews

- Introduce yourself to household members
- Ask permission to carry out the interview
- Obtain informed consent from a capable adult of the household
- Explain the use of the mobile phone in the survey
- Explain and maintain the confidentiality of the responses
- Conduct interviews in accordance with the information and training provided to you
- Respect those who refuse to participate in the interview

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Slide 22



6 Wrap-up in the cluster/area

- Thank the local authorities
- Discuss with your supervisor any challenges or problems that arose and tell him/her if you had any data entry errors
- Send data to the server as soon as possible
- Prepare for the daily quality round (as advised by survey coordinator)

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Slide 23



Special considerations

- Know what to do in case you are unable to interview a selected household (e.g., due to refusal or no one at home)
- Know how many times you must call back if no one is at home the first time

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Slide 24



Safety and security issues

- Travel on reliable vehicles
- Obtain information about any safety issues in the sample areas
- Ensure that any money carried by the field team is secure
- Do not engage in high risk activities (e.g., driving at night)

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Slide 25



Recap: select households to be interviewed

- Locate the cluster
- Segment the area (if required)
- Sub-segment the area (if required)
- Choose a segment
- Create a detailed sketch map of the chosen segment, mapping and numbering all households
- Randomly select households (from the cluster or (sub)-segment of the cluster) to be interviewed

Slide 26



Note:

The following slides which are related to fieldwork procedures can be used as desired. The slides can be used to:

- introduce the activity(ies)
- test for understanding and knowledge
- recap the resources available for fieldwork
- recap supervisor's and interviewer's responsibilities

Slide 27



Fieldwork forms and tools

- Sketch maps
 - Segmentation: sketch map of the cluster (type 1 map)
 - Sketch map of the households (type 2 map)
- Segment identification form
- Random number table
- List of households for random sampling
- Recording of potential data quality issues form
- Monitoring cluster, household and person numbers on the rosters form

Slide 28



Activity: sequencing of fieldwork procedures

- Divide into small groups, representing a survey team
- Perform these tasks
 - Task 1: Open the envelope and remove the contents.
 - Task 2: Place the steps and activities in the correct order in which the step or activity should be carried out in the field
- Be prepared to report back to the larger group
- Time: 20 minutes



Slide 29



Activity: selecting households for the interviews

- Divide into small groups, representing a survey team
- Do the following tasks
 - Task 1: Segmentation of a cluster
 - Task 2: Mapping and numbering households
 - Task 3: Selecting the households to be interviewed
- Be prepared to report back to the larger group
- Time: 60 minutes



Slide 30



**Activity: segment identification.
Choosing one segment**

- Divide into small groups, representing a survey team
- Do the following tasks
 - Complete the *Segment identification form*, activities 1 and 2
 - Be prepared to report back to the larger group
- Time: 15 minutes



Slide 31



Quiz: true or false

- Segmentation must be done for all clusters
- Mapping needs to be done for all clusters
- The mapping is needed to ensure that all households have an equal chance of selection
- Important government buildings must be located on the sketch map
- All housing structures must be counted as a household and included on the *mapping and numbering households map*
- Each interviewer must complete the same number of interviews in a cluster
- If a household refuses to participate in the interview, you must replace that household

Slide 32



Quiz: true or false

- If the population size of a sample cluster is too large, the cluster must be segmented before you can select the households to be interviewed
- It is the supervisor's responsibility to decide whether to segment the cluster
- If no one is at home at the first visit, the interviewer must revisit the house at least one more time
- If no one is home at the selected house, another house must be selected (using the simple random sampling method)

TRAINER'S NOTE

Field survey team responsibilities

Supervisors

Supervisors report directly to the survey coordinator and are responsible for the quality and progress of field activities. They play a significant role in ensuring that work is carried out systematically and in accordance with prescribed field procedures. Supervisors are the liaison between the field and the survey coordinator	
Responsibilities	Tasks
Announce/introduce survey	<ul style="list-style-type: none"> Communicate with the local health and administrative officials in the selected cluster areas to explain the survey and its objectives and to gain their support and cooperation Answer any questions that arise concerning the survey
Ensure quality of data collected	<ul style="list-style-type: none"> Ensure that a uniform set of procedures is followed Make sure interviewers understand their role and tasks Prepare materials and equipment for each workday Make sure that segmentation is carried out correctly Supervise the interviews and collection of data Conduct interviews (if assigned this responsibility) Discuss the quality of their work with the interviewers and check that no errors have been made View data and edit data (if assigned these responsibilities) before data are sent to the server Ensure data are sent to the server At the end of each survey day, organize and submit required forms to the survey coordinator
Ensure safety and well-being of team members	<ul style="list-style-type: none"> Be aware of any security issues in the cluster area Ensure all members of the team return safely at the end of the day Review and follow safety guidelines and procedures in case of difficulties Maintain team motivation and morale and foster team spirit Obtain and manage monetary advances

Interviewers

Interviewers report directly to their supervisor. They are responsible for collecting the data according to the procedures outlined in their training	
Conduct interviews	<ul style="list-style-type: none"> Understand the survey objectives Assist the supervisor to complete the segmentation and mapping of each cluster as appropriate Introduce and explain the survey objectives to the respondents Obtain consent to conduct the interview from respondents Conduct the number of interviews assigned in each selected cluster Maintain a non-judgmental and impartial manner when conducting the interviews Conduct interviews in accordance with the information and training that has been provided
Complete data forms	<ul style="list-style-type: none"> Ensure that questionnaires are fully complete Send data to the server Take note of any data entry errors that may have occurred and report these to the supervisor on a daily basis Discuss with the supervisor any problems or challenges that arise

Drivers

Drivers report directly to the field supervisor. They are responsible for transporting field teams and the survey supervisory support and monitoring team	
Provide transport for field survey teams	<ul style="list-style-type: none"> • Working with maps, local guides, etc., become familiar with cluster areas • Minimize loss of time by being aware of any challenges to access cluster areas • Monitor fuel levels and ensure vehicles are in good running condition • Have a valid driving permit • Drive safely to ensure the well-being of field team members and pedestrians at all times • Understand and abide by all transport laws in place
Be aware of security issues	<ul style="list-style-type: none"> • Drivers can play an important role in being aware of any security issues that may arise and should present this information to the field supervisor

Local guides/translators

Local guides can be used to assist the field survey team with identifying local authorities and organizations and geographic landmarks and dwellings in cluster areas	
Facilitate introductions	<ul style="list-style-type: none"> • Introduce the field survey teams to local authorities, community leaders and relevant organizations
Provide knowledge of the area	<ul style="list-style-type: none"> • The local guide can be a valuable asset in assisting the field survey team with identifying the cluster areas and their boundaries • Provide important information for selecting and mapping segments, and listing and locating households that have been selected to be interviewed
Oral translation	<ul style="list-style-type: none"> • Translate the survey questions/answers as precisely as possible (for those households when the interview cannot be done in the language chosen for the survey)
Remain impartial	<ul style="list-style-type: none"> • It is critical that if a local guide/translator is used, they should remain impartial during the explanation of the survey objectives and the interview, and not influence the implementation of the survey

Session 9

Fieldwork procedures (Part 2): selecting the households to be interviewed

Overall goal	To describe and explain the correct procedure for selecting households to be interviewed
Objectives	<p>By the end of this session, team supervisors and interviewers will be able to:</p> <ul style="list-style-type: none"> • describe the procedure to be used for the selection of households to be interviewed in the survey • explain what segmentation (and sub-segmentation) is and when it needs to be applied • describe how to draw a sketch map to create segments • complete a <i>Segment identification form</i> • describe how to map and number households in a cluster or chosen segment • use a random numbers table to select the households to be interviewed
⌚	70 minutes (some parts of this session will be repeated later, in a supervisor-only session)
Methods	Presentation by trainer, large group exercise, large group discussion/debriefing, small group exercise (optional)
Materials/ preparation	<ol style="list-style-type: none"> 1. Sample PowerPoint presentation “Fieldwork procedures: key steps and activities” (first shown in session 8): focus on those slides that are related to the details for Stage 2, choosing one segment, and Stage 3, random selection of households in the chosen segment (optional). Laptop, LCD projector and screen (optional). 2. Prepare flipcharts with content addressing “Selecting the households to be interviewed” (as per the related content on the PowerPoint slides). To be used only if PowerPoint is not used. 3. Print one copy of the handout “Selecting households to be interviewed: an example” for each participant. To accompany the handout, print one copy of the worksheet “Selecting households to be interviewed: random numbers table” and one copy of the worksheet “Example: list of households for random sampling” for each participant. 4. Print one copy of the activity “Segment identification: choosing one segment” for each participant (optional). 5. Print one copy of the worksheet “Creating segments for the cluster, segment or sub-segment (Sketch map type 1)” for each participant. 6. Print one copy of the worksheet “Sub/segment identification: choosing the segment from which the final selection of households will be made” for each participant. 7. Print one copy of the worksheet “Mapping and numbering households for simple random sampling in the selected cluster, segment or sub-segment (Sketch map type 2)” for each participant. 8. Prepare a flipchart “Recap: selecting households to be interviewed”.
Steps	<p>1. Introduction</p> <p>1.1 Introduce this activity to the participants. <i>Say: In this survey (as in all surveys) you need to make sure that you are interviewing the “right” household. In this survey, <u>all</u> households are eligible to be interviewed, not only households with, for example, children under five years of age.</i></p>

In this part of the training you will learn about main stages and the procedure for selecting the households to be interviewed. I will first briefly describe these stages to you, and after that, we will complete an exercise using a fictional situation in which you will go through the stages.

Briefly describe the procedure that the teams must use to select the households that are to be interviewed in each sample cluster. You can show the relevant slides from the PowerPoint presentation, or you can present the content by using pre-prepared flipcharts.

2. Selecting households to be interviewed from a cluster: a three stage activity (60 minutes)

Tell the participants that we will now look at an example of how to select households to be interviewed in those circumstances when an area needs to be broken down into smaller parts (segments) to make the fieldwork more manageable. We will do this by following along together an example of a fictional village.

Distribute the handout “Selecting households to be interviewed: an example” to each participant. Tell the group that you will walk them through the stages, step-by-step, and that they will follow along using the handout. Tell the participants that we will now start at stage 1 on the handout for the activity.

2.1 Tell the participants to imagine themselves in the following situation.

Say: You are a member of a survey team and your team has been assigned the cluster, Mojani, to survey. This is a village, but note that the cluster is not always going to be a single village. According to the population data available for this village that we retrieved from the last census, it has 150 households and 750 people. With the help of your team’s driver and using the map provided during training, and before your team left for the field survey, you have located the village. Since the population size is so large, your team supervisor has determined that you need to segment the cluster.

Stage 1: segmentation

You meet with the village chief and the local Red Cross or Red Crescent volunteer, and the village chief tells you that there are 157 households in the cluster. From the census data you thought there would be 150 households but he explains the increase by saying that a few families have moved into the village this past year. With the chief’s guidance about the local geography and landmarks, your team decides to divide the area into five segments, according to some known boundaries (the main paved road, the river, footpaths, the location of the chief’s house and a large field). You name the segments Segment 1, Segment 2, Segment 3, Segment 4 and Segment 5. The cluster sketch map that you create is the first map shown on the handout “Selecting households to be interviewed: an example”. This will be the first of two maps that the survey team will need to prepare. You might refer to this map as Sketch map type 1.

2.2 In order to estimate the number of households within each segment, you have spoken to the village chief, and he has told you that there are 22 households in Segment 1, 35 households in Segment 2, 55 households in Segment 3, 26 households in Segment 4 and 19 households in Segment 5.

Stage 2: choosing one segment

Ask participants to turn to stage 2 on the handout. Your next task is to complete the *Segment identification form* in order to identify the segment from which you will select households to be interviewed. On the handout point out the example and explain the headings and the content. Tell the participants that in this example, by following the steps to complete the *Segment identification form*, segment 3 with 55 households is the chosen segment. This was done by choosing a random number between 1 and the total size of the segment (157 households in this example). In the example, we used the random number 74.

Sub-segmentation

Since Segment 3 with 55 households is still too large to make the fieldwork manageable, the segment has to be broken down further. Another map (a version of *Sketch map type 1*) is drawn to divide the segment into three, again using clear landmarks as identifiers. This is shown in the second map on the handout. Then, by completing another *Segment identification form* and again using the random numbers table, Segment 3B with 21 households is selected for the household interviews.

Stage 3: Mapping the chosen segment and randomly selecting households to be interviewed

Ask the group to turn to the handout, stage 3, “Mapping and numbering the chosen segment and randomly selecting households to be interviewed”. Say: *Now that you have chosen a sub-segment, the households that your team will interview will all be from within this area. In order to choose the specific households, your team will first need to map the sub-segment and list all the households. So, how do you do this?*

Refer to the text on stage 3 in the handout and explain the procedure for the mapping and numbering and the random selection of households.

Tell the participants that once they have the sub-segment, they will need to sketch another map (*Sketch map type 2*), showing the location of each household. If the mapping activity is done with the help of a local person then he/she might be able to tell the survey team if a housing structure is occupied by more than one household. If it is, then this should be shown on the map (for example, a dwelling that has two households living in it would be represented by two squares on the map).

Tell the group that at this stage, it is useful to include as much detail as possible in the sketch. For example, try to include roads, paths, streams and landmarks (such as a school, football field, health centre, well, pump, market, church or mosque, field, and so on) in your sketch. Each household needs to be numbered from 1 to the total number of households (in that area/segment). In our example, the households are numbered from 1 to 21.

For the task of choosing the 10 households to be interviewed from the 21, ask for a volunteer to call out the households selected by referring to the worksheet “Selecting households to be interviewed: random numbers table”.

Note on using the random numbers table

Use the random numbers table to choose the ten households that your team will interview. If you know the name of the household head for the chosen households, you can write in the name beside the household number. This might be helpful in assigning the interviews and navigating to the right households. If you need to look for a random number that is less than the maximum number of households in a column (e.g., your selected sub-segment has 21 households, so the random numbers must be between 1 and 21), look in the column labelled “1 to 25” and use the random numbers that are less than or equal to 21. Continue to choose random numbers until you have 10 households.

Number the households that were selected by simple random sampling from 1 to 10. This can be done using the worksheet “List of households for random sampling”. See the example on the worksheet.

Note on numbering the households

In the supervisors-only session, there will be a review of how the households should be numbered. In that session, the supervisors will be instructed on how to use the form *“List of households for random sampling”*. A key message is that you will have two sets of household numbers: first, you will have the “map household number” that you will assign when you do the mapping and listing of the households, and second, you will have the “household interview number” (or “household number”) which will be the number given to the assigned households before the interview. The household numbers will be consecutively numbered from 1 to 10 (that is, the numbering of the households that were selected randomly has been re-ordered so that the numbers are from 1 to 10). *These* will be the household numbers to be entered in the mobile phone.

Ask the participants to study the mapping shown for the chosen sub-segment, and then lead a full group discussion, posing the following questions:

- ➔ *How many households in total does your team need to interview in this area/segment?*
- ➔ *What did you notice about the numbering of the households?*
- ➔ *If you use the household numbers that you originally assigned when carrying out the mapping, what happens? Are the numbers sequential? Are they from 1 to 10?*
- ➔ *Will you use the same numbering of the households for when you carry out the household interviews?*
- ➔ *How will you decide which households each team member will be assigned to interview?*
- ➔ *How will you decide which household will be the first one for you/your team to interview?*
- ➔ *How will you decide which households will be the next ones to be interviewed?*

3. Time for further review and reflection (10 minutes)

Tell the group that you will now give them 10 minutes to reflect on this session and the activity and related handouts and materials. Divide the participants into small groups. If the team supervisors have already been selected, you can ensure that a supervisor is in each small group.

After 10 minutes, ask everyone to regroup, and ask the following questions:

- ➔ *What questions came up in your group?*
- ➔ *Was there anything about the stages and the procedures that did not make sense to you?*
- ➔ *Why do you think that segmentation is important in this survey?*
- ➔ *Did you come across any problems in using the random numbers table to select a segment?*
- ➔ *Why is it important to use a random number to select the households to be interviewed?*

As a test for understanding, ask for a volunteer to explain how to use the random numbers table to identify the ten households to be interviewed. Quiz questions can be asked too to test for understanding (see sample questions on slides 31 and 32 of the PowerPoint slide set).

- 3.1** If there is time, a reinforcement of the (sub)segmentation and mapping procedures can be done using the optional activities, “Segment identification: choosing one segment”, “Creating segments for the cluster, segment or sub-segment (*Sketch map type 1*)”, “Choosing the segment from which the final selection of households will be made: Step 1”, “Sub-segmenting a segment (if segment is still too big): Step 2” and “Mapping and numbering households for simple random sampling in the selected cluster, segment or sub-segment (*Sketch map type 2*)”. Additional similar

exercises with different estimates of population size can be developed by the trainer “on the spot” and the information to guide an exercise posted on flipcharts. [See the PowerPoint slide set for a slide that can be used to introduce this activity (30, Activity: segment identification).]

- 3.2** Post the flipchart “Recap: select households to be interviewed”. Ask for a volunteer to read the content. Answer any questions.

Recap: selecting households to be interviewed

- Locate the cluster
- Draw a sketch map of the area (*Sketch map type 1*)
- Segment the area (if needed) and choose one segment
- Sub-segment the area (if needed) and choose one sub-segment
- Draw a map (*Sketch map type 2*) that shows all households in the chosen (sub)-segment and list/number the households
- Randomly select the households to be interviewed

- 3.3** Tell the participants that each team will be provided with a number of tools that they can use to help them in the field, as needed. The following forms will be provided to each team supervisor:
- Creating segments for the cluster, segment or sub-segment (*Sketch map type 1*). This can be used on arrival at the village if it is found that no sketch mapping at all has been prepared in advance of the team’s arrival at the village
 - *Segment identification form*
 - Mapping and numbering households for simple random sampling in the selected cluster, segment or sub-segment (*Sketch map type 2*)
 - *Random numbers table*
 - *List of households for random sampling*

These tools are listed on slide 27 of the slide set.

Stress that while it is the supervisor who will lead the team in the field, all members must work together. Cooperation will help build and maintain team spirit, and help ensure that the field work is done efficiently and the work distributed fairly.

Following the correct field procedures can help ensure that all households do have an equal chance of being selected for the survey. This is one of the fundamentals of good survey design and implementation.

4. Closure

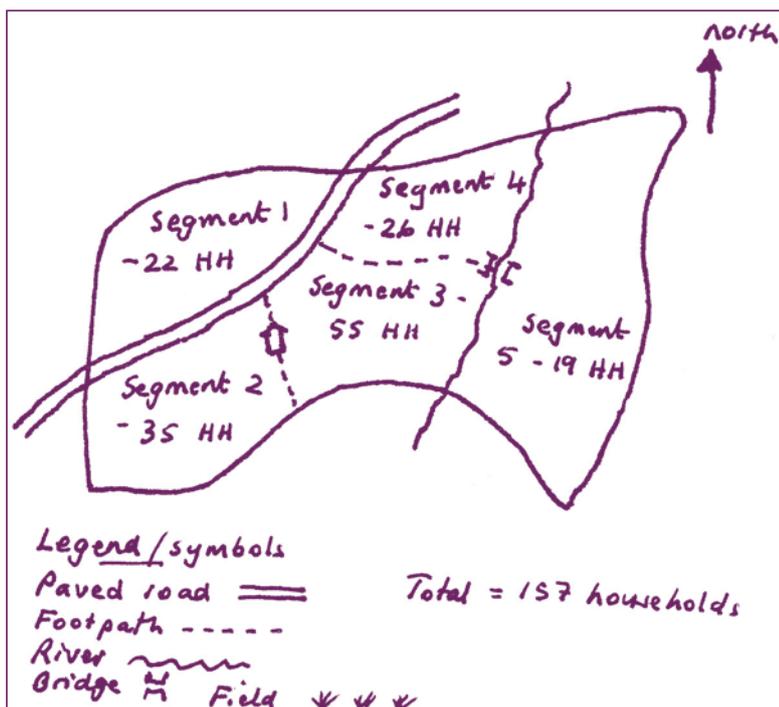
At the end of the session, tell participants that more time will be spent with the supervisors on the stages and procedures for selecting households to be interviewed. In the meantime, encourage all participants to do some homework by re-reading the handout “Selecting households to be interviewed: an example” to increase their understanding of this important part of the survey. The supervisors should also study the handout before they attend the supervisors-only session on the last day of training.

- 4.1** Thank the participants for their hard work, and tell them that, with more time and the experience of being out in the field, and with the support of their team members, the process of selecting the right households to interview will become easier and they are sure to master it.

HANDOUT**Selecting households to be interviewed: an example****Stage 1: Segmentation****Stage 2: Choose one segment****Stage 3: Mapping the chosen segment and randomly selecting households to be interviewed****Stage 1: Segmentation**

Segmentation simply involves dividing your cluster into smaller parts (segments/sub-segments). How?

- Draw a sketch map of the cluster. Show the outer boundaries of the cluster. The sketch does not have to be very detailed, and can be fairly crude at this point. The village elder or authorities and community volunteers may help to prepare the sketch and it can even be done in advance of your visit to the field. This can be very helpful and is strongly recommended.
- Then, divide the area into segments. Use natural boundaries such as roads, footpaths, streams, fields, etc. to determine the boundaries of the segments and create each segment. Indicate the approximate number of households (or population size) in each segment.
- You do not need to be exact at this point. The physical size of the segments does not have to be identical. The figure below is an example of a hand-drawn sketch map that shows the creation of five segments from the cluster, the village of Mojani. Note that there may be more than one household in a dwelling or structure.



Sketch map type 1 showing the creation of segments from a cluster

Stage 2: Choosing the one segment that you will work in

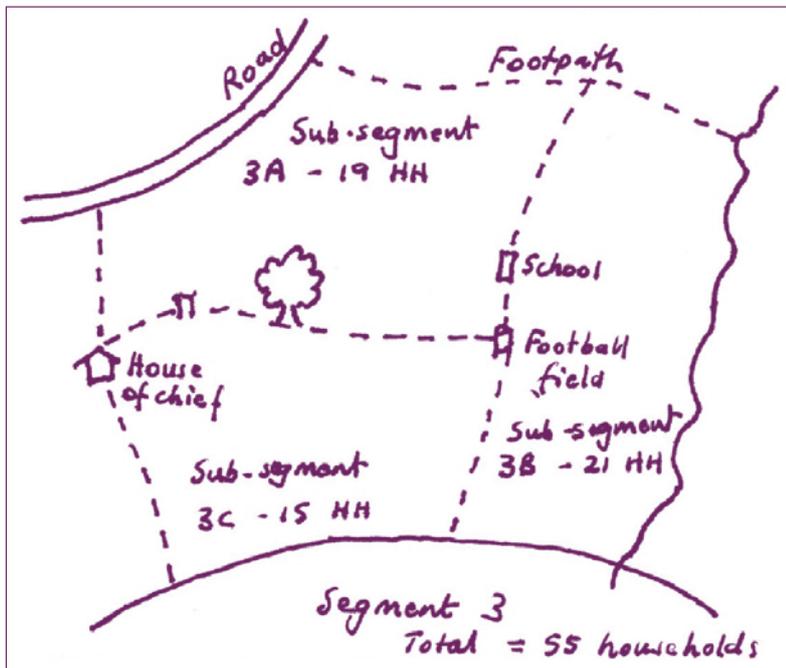
Now, you will choose ONE segment from the segments that you have just created. How?

- ❑ Complete a *Segment identification form* for the village/the cluster. An example is shown below.
- ❑ Choose a random number between 1 and the total estimated number of households in the segment map that you have just created. In this example, the number needs to be between 1 and 157. Using the cumulative size column, see which sub-segment was “hit”. This is the sub-segment that will be chosen for your household interviews. For example, the random number identified here was “74”, so Segment 3 was selected.

Using the segment identification form to choose one segment

Segment identification form				
Total size (households or population) of all the segments or sub-segments listed below. <i>Mojani</i>				<i>157</i> <i>households</i>
Random number from one (1) to total size (<i>between 1 and 157</i>)				<i>74</i>
Consecutive number	Name/label of segment or sub-segment	Size (number of households or population)	Cumulative size (number of households or population)	Segment/sub-segment selected (mark with an “X”)
<i>1</i>	<i>Segment 1, north side of the paved road</i>	<i>22 households</i>	<i>22</i>	
<i>2</i>	<i>Segment 2 – near the bridge</i>	<i>35</i>	<i>57</i>	
<i>3</i>	<i>Segment 3 – between the chief’s house, the river and the field</i>	<i>55</i>	<i>112</i>	<i>X</i>
<i>4</i>	<i>Segment 4 – to north of the field</i>	<i>26</i>	<i>138</i>	
<i>5</i>	<i>Segment 5 – other side of the river</i>	<i>19</i>	<i>157</i>	

- Segment 3 (55 households) has been selected in our example. But this segment is still too large, so it will need to be broken down into smaller pieces, called sub-segments. You will now draw more details for segment 3, to help you choose one final sub-segment that will be small enough to map all the households in the area. In our example, the area has been broken down into three sub-segments called Sub-segments 3A, 3B and 3C.



Sketch map that shows Segment 3 (with its total of 55 households) broken down into three sub-segments

- Complete another *Segment identification form* for the sub-segments. An example is shown below.
- Choose a random number between 1 and the total number of households in the segment map that you have just created. In this example, the number needs to be between 1 and 55. Using the cumulative size column, see which sub-segment was “hit”. This is the sub-segment that will be chosen for your household interviews. For example, the random number identified here was “29”, so Segment 3B was selected. That is the segment that you will now work in and from which you will now choose the 10 households that you will interview.

Using the segment identification form to choose one segment

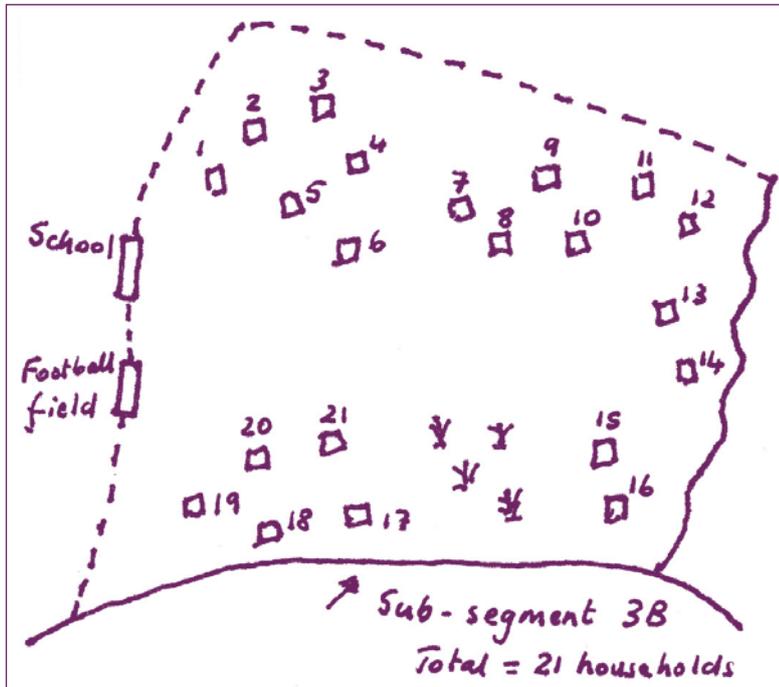
Segment identification form				
Total size (households or population) of all the sub-segments listed below				<i>55 households</i>
Random number from one (1) to total size (<i>between 1 and 55</i>)				<i>29</i>
Consecutive number	Name/label of sub-segment	Size (number of households or population)	Cumulative size (number of households or population)	Sub-segment selected (mark with an "X")
<i>1</i>	<i>Segment 3A – near the school, north of big tree</i>	<i>19 households</i>	<i>19</i>	
<i>2</i>	<i>Segment 3B – along the river</i>	<i>21</i>	<i>49</i>	<i>X</i>
<i>3</i>	<i>Segment 3C – south of the big tree</i>	<i>15</i>	<i>55</i>	

Stage 3: Mapping and numbering the chosen segment and randomly selecting households to be interviewed

You are now ready to select the households to be interviewed in this cluster. How?

- Segment 3B (21 households) has been selected in our example. You will now draw more details for this segment. This segment size is small enough to map or list all the households in the chosen segment.
- You will now draw a map showing all the households in the chosen segment. If a dwelling is occupied by more than one household then this should be shown on the map (for example, a dwelling that has two households living in it would be represented by two squares on the

map). You may have some tools that can help you to list all the households, for example, a maternal-child health (MCH) register. Then, assign each household a number. It can be helpful if the name of the household head is known. If you wish, you can write the name of each household head on the sketch.



Mapping the chosen sub-segment (3B)

- ❑ Use your random numbers table (see below) to select 10 households. The 10 households that you will interview will come from this group of numbers. On your sketch map you can put a check mark beside each of the selected households or circle them.
- ❑ Re-order the households so that they fall between 1 and 10. This can be done using the worksheet “List of households for random sampling” (see our example below). In the worksheet, mark the 10 households selected with an “X” (in column 2). Re-number the 10 households selected so the household numbers are 1 to 10 (column 3, household interview number). Decide which households each member of the survey team will be assigned to interview. You might find it convenient to assign the households as follows: household numbers 1 to 5 to one interviewer and household numbers 6 to 10 to another interviewer. If the supervisor will also carry out some interviews, the assignment could be: household numbers 1 to 4 to one interviewer, household numbers 5 to 8 to another interviewer, and household numbers 9 and 10 to the supervisor. Rarely, when an interviewer arrives at a household to be interviewed, he or she will find that there is more than one household sharing the dwelling. In this case, the interviewer will interview all the households living in that dwelling. The household number for those additional households will be greater than 10. The supervisor must be advised, and will add these additional households to the list of households that were interviewed. This should be an uncommon situation if local assistance is sought before the maps are drawn.

WORKSHEET

Selecting households to be interviewed: an example

RANDOM NUMBERS TABLE

		Number of households mapped in the segment from which to sample households using SRS				
		1 to 15	1 to 20	1 to 25	1 to 30	1 to 40
Households to be sampled	1	13	10	11	22	5
	2	3	5	16	3	35
	3	14	18	22	23	26
	4	1	13	4	5	13
	5	5	8	20	20	20
	6	10	2	1	26	16
	7	8	1	21	11	8
	8	6	3	2	21	2
	9	4	15	14	6	4
	10	9	4	12	7	18
	11	2	14	13	28	38
	12	11	16	10	13	28
	13	7	9	9	9	14
	14	12	19	6	17	40
	15		11	19	27	7
	16	-----	12	17	14	11
	17	-----	7	15	15	36
	18	-----	17	8	2	21
	19	-----	6	24	19	9
	20	-----		7	8	19

Note: You may need to identify a random number that is less than the maximum number of households in a column. For example, your selected segment has 21 households so the random number must be between 1 and 21 inclusive. Look in the column labeled 1 to 25 and use the numbers that are less than or equal to 21. Number 22 in row 3 cannot be used, so can be crossed off immediately.

WORKSHEET

List of households for random sampling: an example

Cluster (Mojani, sub-segment 3B)			Team supervisor <i>Beauty</i>			Date: <i>2 November</i>		
Map household number (number of the household from the map of households) -1	Selected at random (mark with an "X") -2	Household interview number (consecutive household number assigned for households chosen at random (and marked with an "X" in column 2) -3	Map household number (number of the household from the map of households) -1	Selected at random (mark with an "X") -2	Household interview number (consecutive household number assigned for households chosen at random (and marked with an "X" in column 2) -3			
1	X	1	26					
2	X	2	27					
3			28					
4	X	3	29					
5			30					
6			31					
7			32					
8			33					
9			34					
10			35					
11	X	4	36					
12	X	5	37					
13	X	6	38					
14	X	7	39					
15			40					
16	X	8	41					
17			42					
18			43					
19			44					
20	X	9	45					
21	X	10	46					
22			47					
23			48					
24			49					
25			50					

Note: Use the random numbers table to select 10 households. Indicate which households have been randomly selected (column 2). Number the households that were selected by simple random sampling consecutively from 1 to 10 (column 3).

WORKSHEET

Optional activity

Segment identification: choosing one segment

Exercise 1

Segment identification form				
Total size (households or population) of all the segments, sub-segments or administrative units listed below				210
Random number from one (1) to total size				83
Consecutive number	Name/label of segment, sub-segment or administrative unit	Size (number of households or population)	Cumulative size (number of households or population)	Segment/sub-segment/unit selected (mark with an "X")
1	Segment A	70 households	70 households	
2	Segment B	60	..... households	
3	Segment C	80	..... households	

Exercise 2

Segment identification form				
Total size (households or population) of all the segments, sub-segments or administrative units listed below				325
Random number from one (1) to total size				277
Consecutive number	Name/label of segment, sub-segment or administrative unit	Size (number of households or population)	Cumulative size (number of households or population)	Segment/sub-segment/unit selected (mark with an "X")
1	Segment A	100 households	100 households	
2	Segment B	95	..... households	
3	Segment C	130	..... households	

Note: If you can map all the households in the chosen segment then proceed to mapping the chosen segment, numbering all the households and randomly selecting households to be interviewed. Try to have 15 to 20 households in the final segment from which you will choose to carry out the interviews. This will make your fieldwork more manageable, and you will be able to map the area, count all the households, and interview the selected households within that final segment.

Creating segments for the cluster, segment or sub-segment (Sketch map type 1)

REMEMBER: Use natural boundaries to determine the boundaries of the segments. After you divide the area into segments, you will then choose one segment: use the *Segment identification form* to help you do this. Try to have around 15 to 20 households in the final segment. This will be the segment in which you will carry out the interviews.

WORKSHEET

Optional activity

Step 1: Choosing the segment from which the final selection of households will be made

Segment identification form				
Total size (households or population) of all the segments, sub-segments or administrative units listed below				
Random number from one (1) to total size				
Consecutive number	Name/label of segment, sub-segment or administrative unit	Size (number of households or population)	Cumulative size (number of households or population)	Segment/sub-segment/unit selected (mark with an "X")
1		. . . . . households	. . . . . households	
2			. . . . . households	
3			. . . . . households	

Step 2: Sub-segmenting a segment (if segment is still too big)

Segment identification form				
Total size (households or population) of all the segments, sub-segments or administrative units listed below				
Random number from one (1) to total size				
Consecutive number	Name/label of segment, sub-segment or administrative unit	Size (number of households or population)	Cumulative size (number of households or population)	Segment/sub-segment/unit selected (mark with an "X")
1		. . . . . households	. . . . . households	
2			. . . . . households	
3			. . . . . households	

Mapping and numbering households for simple random sampling in the selected cluster, segment or sub-segment (*Sketch map type 2*)

Remember: You need to map ALL the households, and assign a consecutive number to each of the households. These are the “map household numbers”. Then, you are ready to randomly select the households that your team will interview for that cluster. Ten (10) households need to be selected to be interviewed. Re-order the households so that each one has a number from 1 to 10. This is the “household interview number” or “household number”: to help you do this, use the *List of households for random sampling* form.

Session 10 Field practice

Overall goal	To practise and apply the correct field procedures for the survey
Objectives	<p>By the end of this session, participants will have:</p> <ul style="list-style-type: none"> • experienced interviewing actual households • worked as a team to complete a field practice survey • applied a number of the prescribed field procedures for the field survey • interviewed at least three households (at least one for the first practice session and two in the second practice session), using the mobile phone to enter data and carrying out the interview using effective interview techniques
🕒	3–4 hours for each practice outing (depending on travel time and the specifics of the chosen site for the field test survey)
Methods	Presentation by trainer, field practice survey (two outings are recommended)
Materials/ preparation	<ol style="list-style-type: none"> 1. Make arrangements for the field practice survey. Use the “Sample checklist: planning the field practice survey” to ensure that the field practice survey is well-planned. 2. Write “Field practice objectives” on flipchart paper. 3. Prepare and write on a flipchart a “Field practice schedule” with key information for the practice session. 4. Prepare a flipchart with information relating to “Teams”. 5. Prepare a flipchart with information relating to “Communications”.
Steps	<p>1. Preparation for the field practice survey (30 minutes)</p> <p>1.1 Say: <i>To prepare you to go to the field to carry out the interviews, we are going to conduct a field practice survey. This field practice will give you the chance to put into practice many of the things you have learnt during this training so far, in a real field setting, with actual households. Once the field practice survey is over, we will reflect on that experience and use it to make sure that all of us are well-prepared for the actual survey.</i></p> <p><i>So, what is going to happen today? First, we will form teams. Every one of you will be assigned to a team. There is also a team of facilitators to provide guidance and support today. Introduce the facilitators. We have identified a field site that we will visit today, and you will be told in a few minutes the name of the site that your team will visit.</i></p> <p>1.2 Post the flipchart with the “Field practice objectives”. Ask one of the participants to read each of these objectives out loud. The objectives are as follows:</p> <div data-bbox="499 1626 1428 1821" style="background-color: #f9e7f9; padding: 10px;"> <p>Field practice objectives</p> <ul style="list-style-type: none"> • Carry out some of the field procedures that have been taught so far in the training • Experience carrying out a household interview, using the mobile phone to collect the data • Work as a member of a survey field team </div> <p>1.3 Say: <i>As a result of this field test, we expect that you will gain confidence in your ability to be an interviewer (or supervisor), and begin correctly to apply in the field the various procedures that are part of conducting a good survey. You will have the chance to practise and strengthen your interview skills, and experience being a member of a survey team in the field.</i></p> <p>Ask if there are any questions about these objectives and expectations.</p>

- 1.4** Provide information about some of the important logistics details for the field practice, such as: How will you be organized? Where are you going? How will you get there? How will you know which households you will interview? How will you get back? How long will you be in the field? (These arrangements will have been made in advance by the survey coordinator.)

Post information that summarizes the schedule for the field practice activity. Information on the flipchart “Field practice schedule” should include at least the following: departure time to the field, getting organized for the interviews at the field site, time allowed for the interviews, departure time from the field.

Post the flipchart paper that reads “Teams”. The trainees can be assigned to work in pairs. Ask the participants to note to which team they have been assigned and to gather in that team.

Next, post the flipchart paper that reads “Communications”. Ask the participants to write down the information that is relevant to their team assignment (that is, the name and telephone number of the field test coordinator, and the name and mobile phone number(s) of the facilitator assigned to their team). Some participants might also decide to obtain the mobile phone numbers of their team members and/or persons assigned to other teams.

Provide clear information about the transport arrangements, and tell the participants where their transport is waiting for them.

- 1.5** Ask: *Are there any questions about the field test survey? Does everyone know which team they are on? Who their partner is? Do you know where your team is going? Have you written down the information for contacts?*

Answer any questions and explain that each team will be accompanied to the site by a field survey facilitator, and that they will have a chance to ask questions in the field. Remind all participants not to forget to take their charged mobile phone and the job aids.

- 1.6** Leave for the chosen field practice survey sites.

2. The field practice (approximately 2.0–3.0 hours, not including travel time)

- 2.1** Travel to the chosen field practice sites. Each team will be accompanied by a member of the field test facilitation team that has been assigned to their team.
- 2.2** Each team will carry out the field practice survey in the site that has been assigned to them, applying the prescribed field procedures that they have so far learnt during the training, to the extent that is feasible. For the first field practice, the interviewers can be assigned to work in pairs. They will visit the assigned household together, but only one person will lead the interview. The other person should listen carefully, not interrupt the flow of the interview, and enter data too as the interview proceeds. At the second household, they should switch roles. Depending on the time taken to complete these two household interviews (and the arrangements made for selecting households) the team might be able to proceed to another household to complete an interview.
- 2.3** Over the duration of the training, it is recommended that two field practice outings will be organized. During the second field practice, the participants should each be assigned different households and each person should carry out at least two interviews. The expectation is that over this time, each trainee will be able to carry out at least three complete interviews. If supervisors have been identified before each field practice, then the supervisors should carry out those responsibilities that are expected of a supervisor while in the field, to the extent that it is feasible, as well as carry out interviews if they have been assigned this responsibility.

The members of the field practice facilitation team can observe some of the interviews. Constructive feedback should be provided to each trainee immediately after the interview. The facilitator should mention any mistakes or problems discovered during the observation of the interview as well as things that the interviewer did correctly.

When the teams have completed the field practice, they will return to the training site, or can be dismissed for the day. This will depend on the travel time and the specific agenda adopted for the field practice. On our sample agenda, the field practice takes place in the morning and the trainees return to the training site for lunch and afternoon sessions.



Sample checklist – Planning the field practice survey

	Yes	No	Comment
1. Select the field practice survey site			
Has the field practice survey site been identified? <i>It should be close to the training site and not be one of the clusters selected for the RAMP survey. It should be an area where bed nets have been distributed to households thus allowing the interviewers to practise completing the bed net roster.</i>			
2. Communicate with local authorities and leaders			
Have the local authorities or leaders been informed about the field practice survey? <i>They should be told about its purpose, and the date and time that the survey teams will visit.</i>			
3. Communicate with local Red Cross or Red Crescent volunteers			
Have the Red Cross or Red Crescent volunteers in the field survey site been told about the field test and asked to assist?			
4. Select households to be interviewed			
Have you decided how the households to be interviewed will be selected, and how they will be assigned? <i>A cluster number should be assigned and households should be given household numbers.</i>			
5. Arrange transport			
Has transport been arranged for all those involved in the field test? <i>Trainees and the field practice facilitation team will need transport.</i>			
6. Arrange food and snacks			
Have arrangements been made to provide the interviewers with beverages and snacks, or a lunch, as appropriate?			
7. Establish the supervisory support structure			
Have individuals been identified to serve as members of the field practice facilitation team?			
Have these individuals been informed of their duties for the field practice?			

Session 11 Learning from the field practice

Overall goal	To reflect on and learn from the experience of the field practice
Objectives	By the end of this session, participants will be able to: <ul style="list-style-type: none">• identify challenges to working in the field and ways to overcome these challenges• demonstrate skills and confidence in carrying out their responsibilities in the field• identify and use job aids and tools correctly, recognizing their importance to good quality fieldwork
	90 minutes
Methods	Self-assessment, small group discussion, large group discussion
Materials/ preparation	<ol style="list-style-type: none">1. Prepare the self-assessment form, modifying it to reflect the specifics of your survey. Make a copy of the form for each participant.2. Write the questions related to “Reflecting on the field experience” on a flipchart.3. Prepare papers with the values 1 to 5 written on each one for the exercise “How prepared am I?” (optional).4. Set up the LCD projector, laptop and screen. Obtain an internet connection. This set-up is needed if the data collected during the field practice will be projected (optional).
Steps	<ol style="list-style-type: none">1. Self-assessment (10 minutes)<ol style="list-style-type: none">1.1 Distribute a copy of the form “Self-assessment of performance in the field practice survey” to each participant. Tell the participants that they have five to ten minutes to complete this assessment. The aim is to give each person the chance to think about the experience that they just had in the field, and assess whether or not they were able to carry out some of the key activities that need to be followed in the field. The training coordinator will decide whether or not the forms are to be collected. If the forms are collected then the trainee should sign their self-assessment, and the training team will review each form and can use the information to customize the training. When the time is up, tell the participants that they will now work together, in small groups and then in the large group, reflecting on what happened in the field practice survey and identifying what can be learnt from the experience.2. Reflecting on the field practice experience (75 minutes)<ol style="list-style-type: none">2.1 Say: <i>Each of you has now experienced the field survey, or at least, parts of it. You will now have the chance to reflect on this experience, share what you faced in this experience, and identify what you learnt from it.</i>2.2 Ask the participants to gather in their teams (i.e., the same as for the field practice survey).2.3 Post the flipchart paper with the heading “Reflecting on the field experience”. Tell the groups that they will now have the chance, as a team, to talk about what happened during the field experience. Read the questions out loud: Reflecting on the field experience<ul style="list-style-type: none">• What did your team do well?• What is one thing that you would change to improve the way that your team works in the field?• What challenges, concerns or questions did each of you have?

- 2.4** Give the teams about 10 to 15 minutes to discuss their responses to the questions. Emphasize that it is important that each person on the team should have the chance to express him or herself. Each person will have had his/her unique experience, and we want to capture that experience, hear about it, and learn from it. Ask the teams to record their feedback by writing their responses on a piece of paper.

Circulate around the teams to make sure they understand the directions and provide guidance and correction if needed.

Bring the groups back together again and ask each group (or each person) to provide one challenge or concern that they encountered or any questions they have about the interview. Write it on a flipchart and go to the next group or person for a different idea. Continue until all groups or individuals have spoken, and there are no new points that the participants can add.

Ask: ➤ *Do we see any patterns in the kinds of challenges and concerns encountered during the fieldwork?* Refer to the flipcharts on which challenges and concerns are noted, and identify if some of the points can be grouped together. Identify a specific challenge or concern (or grouping of challenges/concerns) and, taking each one in turn:

Ask: ➤ *What can be done to overcome this challenge or concern?*

Some challenges, concerns or questions raised might include the following:

- interviewer uncertain about how to locate the sample household
- arrived at the dwelling and found that two households live in it
- no one at home in the sample household
- refusal to participate in the survey
- technical difficulty in using the mobile phone
- relatives or neighbours are present during the interview and interfere or answer questions
- consent has been given, the respondent starts to answer questions but after the interview has begun, the household head arrives on the scene
- respondent asks for a bed net, medicines or some other goods or services
- interview takes a long time and respondent indicates that he/she wants it to end
- team not working together well
- poor communication with the field facilitation team

Variation: the contributions from each group or individual can be taken in a series of “rounds”, with a discussion following each round of contributions.

The data collected during the field practice can be viewed, using the laptop and projector. Show each of the questionnaires and highlight and discuss any key points or problem areas, or actual mistakes. Be careful not to embarrass individual interviewers. Also mention things that the interviewers did correctly. Take this opportunity to stress that the performance of each person has a major effect on the quality of data collected for the survey.

- 2.5** Ensure that the group understands that it is normal that there will be challenges and surprises along the way during the fieldwork. Fortunately, there are methods and strategies to deal with many of these. Provide information about strategies and ways to deal with the challenges or problems raised by the teams. Draw upon the experiences and suggestions of the participants. Stress that there are tools and techniques that can help. Remind the participants that the answer or response to a challenge might be outlined in one of the resource materials for the training (e.g., in a handout or job aid). Reassure the participants that there will be supports along the way, such as their supervisors, their fellow team members, the survey coordinator and the survey supervisory support and monitoring team.

- 2.6** Assure the participants that the aim of the training is to make sure that all participants gain the confidence and skills to carry out a successful survey. There is much to be learnt and applied in the field, but everyone has made great progress so far.
- 2.7** Ask: *Given your participation in this training so far (including the field experience) do you have any unanswered question or concern? Is there something that is bothering you? Is there a technical issue that you do not yet fully understand?* Let the participants think in silence about this question for a minute or two.
- 2.8** Variation: “How prepared am I?” Ask the participants: On a scale of one to five, where one is “not prepared” and five is “well-prepared and can head to the field immediately” how would you rate your level of preparedness for successfully carrying out the field survey? Point out that around the room the values one to five are posted on the wall. Tell them that they should go to where a value that they think matches their level of preparedness for the survey is posted. Ask them to briefly discuss and identify in their group any outstanding questions or concerns they still have. (This activity could also be used to help establish the composition of the teams for the fieldwork.)

This activity needs to be done with care so that those at a lower end of the scale do not feel demoralized. Stress that the aim of the training is to ensure that everyone is well prepared for the survey and that it helps the trainers to know if there are areas in the training where attention is still needed.

Ask participants to share their questions or concerns. Answer any questions and address any concerns raised.

3. Closing (5 minutes)

- 3.1** End the session by thanking the participants for their hard work during the field practice survey and their efforts during this activity.
- 3.2** Tell them that the time for them to leave for the actual survey is coming ever closer, and that the next sessions will help them to prepare for this. There will be time to address logistics and administrative issues and to go over technical issues.

HANDOUT**Self-assessment of performance
in the field practice**

	Yes	No
Prepare for the interview		
1. Ensured mobile phone was charged		
2. Dressed appropriately		
3. Reviewed the questionnaires		
4. Made sure I had my job aids handy		
5. Made sure I knew the correct cluster number and household numbers		

Obtain consent		
1. Approached the household using correct procedure		
2. Greeted the person with respect		
3. Covered the points on the "Obtain consent" script		

Carrying out the interview		
1. Entered the correct cluster number and household number in the mobile phone		
2. Established a rapport with the respondent		
3. Asked questions as they were written		
4. Did not ask leading questions		
5. Did not judge the responses		
6. Thanked the respondent for their time		
7. Encouraged the use of ITNs for all household members		

After the interview		
1. Arranged to send data to the server		
2. Met others at agreed-upon place		
3. Sent text message to field practice support team as instructed		

Session 12 Getting ready for the field (Part 1)

Overall goal	To ensure that the teams are well prepared for the field by dealing with the necessary logistics and administrative issues beforehand
Objectives	By the end of this session, supervisors and interviewers will have: <ul style="list-style-type: none"> • met as a team • reviewed the survey movement plan for the clusters assigned to their team • received the field supplies, equipment and final instructions needed for the fieldwork
🕒	135 minutes (the contents of this session can be spread in segments over two of the training days)
Methods	Presentation by the trainer, large group discussion, team discussions, distribution of daily allowances and field supplies and materials
Materials/ preparation	<ol style="list-style-type: none"> 1. Prepare a flipchart entitled “Teams” and sufficient sticky notes or index cards on which to write each participant’s name. 2. Obtain information about the estimated population size of each of the clusters to be surveyed (provided in the document showing the 30 clusters selected for the survey). 3. Print one copy of the draft “Survey movement plan/schedule” for each team (template to be developed by the survey coordinator). The plan needs to be prepared in advance of the training, and should have input from persons knowledgeable about the clusters to be surveyed (regarding factors such as terrain, distance between clusters). 4. Obtain a copy of the maps available for each survey team. Ideally, each team will be provided with an area map and a map of each cluster that the team has been assigned to survey. If advance mapping has been done by a Red Cross or Red Crescent volunteer or village authority then this mapping too should be provided to the team assigned to survey that cluster. 5. Print one copy of the handout “Our team’s survey movement plan” for each team. 6. Prepare a preliminary “Contacts” list. 7. Print one copy of the form “Payment schedule”. (If payments are made to the survey team members on more than one occasion, then print the appropriate number of copies.) 8. Print copies of the "Daily checklist for supervisors" for each supervisor (see Session 13).
Steps	<ol style="list-style-type: none"> 1. Introduction to this session <ol style="list-style-type: none"> 1.1 Introduce this session by emphasizing that the success or failure of a survey may depend on logistics and administrative issues. Explain that prior to coming to this training, much work has already been done to ensure the success of the survey. We will all work together to make sure that all the needed logistics are in place before the teams leave for the field. Let the participants know that in this session information will be provided to all the participants, and that there will be a special session later only for the supervisors. In that session, added details and training will be provided, related to their unique responsibilities as supervisors. 1.2 We will start this session by reviewing details about team composition and assignments.

2. Team composition (45 minutes)

- 2.1** Explain to the participants that the team composition (supervisors, interviewers, drivers, etc.) has been determined. Explain the factors that were taken into account in making this decision (e.g., trainees' background and skills, performance during the training, knowledge of language and culture of the selected area, gender, and so on) and who was involved in making the decision.

Post the flipchart with the team headings shown (e.g., team A, team B, etc.). Under each team heading, the name of the supervisor and the interviewers should be written. This can be done directly on the flipchart or instead, the names can be written on sticky notes or index cards, enabling a name to be easily moved if a change in the team composition is desired.

Read the names of the teams and its members out loud.

- 2.2** After the composition of each team is announced, call out the name of each team in turn and ask members of that team to stand up and state their name. Ask if there are any questions or feedback about the teams and their composition.
- 2.3** Answer any questions. Depending on feedback, it may be necessary to make some changes to the team composition.
- 2.4** Tell participants that for the rest of the training the teams should sit together. Divide the participants into their teams, with all team members sitting together.

Explain to the participants that the next activities will prepare them even more for working in the field. Much of the training so far has focused on technical issues, and now many practical issues will be covered, such as travel, logistics and administration.

3. Reviewing the survey movement plan (40 minutes)

Tell the group that now that they know which team they are on, the next activity is to review the team's itinerary or schedule. This is what we call the survey movement plan. Where are you going? When? Which clusters will you survey and in which order?

Distribute one copy of the draft "Survey movement plan" and "Our team's survey movement plan" to each participant.

Distribute the relevant maps to each team. (Depending on the clusters selected for the survey, it may not be possible to obtain a map for each cluster.) Provide information about the estimated population size of each of the clusters to be surveyed.

Explain that working in their teams, each team will now have the opportunity to review the draft survey movement plan. Tell the participants to focus on that part of the plan that indicates what their team's assignment is.

Instruct them that their task is to examine the plan. Applying their own knowledge (such as geography, customs) about the area that they have been assigned to survey and the realities of fieldwork, the teams will either confirm that the plan is feasible, or else suggest some changes. For example, a team might suggest that the order of surveying the clusters could be changed, or else speak with other teams and propose a schedule that allows for teams to travel or work together.

Say: *Some factors to think about as you check over the survey movement plan are (1) the total duration of the survey, (2) the estimated time that is needed for getting to your sample area and (3) how you will get to the sample cluster. Will you always travel by vehicle or will there be a need to travel by other means, such as boat, motorcycle, horse, bicycle, and so on? Where do you plan to spend the night?*

Tell the group how much time they have to complete the exercise.

Circulate among the teams, providing guidance and answering questions, as needed.

Once the time is up, ask: *Did your team feel that the survey movement plan was realistic and achievable within the time allowed for the survey? Did you identify any obstacles or problems that you think need to be addressed before you leave for the field? Do you have any recommendations to make?*

In the large group, answer questions and address any obstacles or problems that may have been mentioned. If appropriate, let a team know that you recognize that a further review and assessment of their team's itinerary is needed and that you will address the team's questions or needs on an individual team basis.

Be prepared for the possibility that a team may not be satisfied with their team assignment. One possible reason for dissatisfaction could be the perception that the workload is not fairly distributed across teams. If this situation arises, listen respectfully to the questions and comments. Provide an immediate response if possible. Let the teams know if and how there could be flexibility in these assignments. There may be some issues that cannot be addressed immediately but you should reassure them that they will not be forgotten.

Let the group know that the plans for the teams' itineraries will now be reviewed and finalized, and will take into account the feedback that has just been received.

Tell the participants that once the survey movement plan is finalized the plan will be shared with everyone and a copy given to the supervisors. Each team can then take the information specific to their team's movements, and write it on the form "Our team's survey movement plan".

4. Communications (5 minutes)

4.1 Communications between the survey teams and the survey coordinator must be established for the whole duration of the fieldwork. Tell the participants that the supervisor will be provided with the protocol for communications with the survey coordinator and that the supervisor will be the main link between the field and the survey coordinator.

4.2 Circulate a form and ask each person to provide, if possible, their personal mobile phone number (indicating the service provider). This information can be valuable since there may be some areas in which the mobile phone network coverage for the service provider chosen for the survey will be poor and it will be helpful to be able to communicate with the survey team by using another network.

Use this information to prepare a more complete "Contacts" list (see session 13 for a sample of this tool).

Other logistics and administrative issues (45 minutes)

The activities below will generally take place on the last day of training.

5. Daily allowances

It is important to ensure that the team members leave for the field with the funds (the daily allowance or “per diem”) that may be needed for expenses (e.g., accommodation, meals). Call out the names of each participant and on a one-on-one basis, distribute the allowance to them. Use the “Payment schedule” form that has been designed to record this transaction and ensure that it is signed by each individual.

6. Equipment, materials and supplies

- 6.1 Ensure that each team member signs the “Equipment sign-out sheet” that will be presented to them by their team supervisor (after the supervisor has met with the trainers to receive the team’s “package” of field equipment). By signing the sheet, the interviewer is confirming that he/she has received a mobile phone and phone charger for use during the survey.
- 6.2 Using the sample “Field supplies and materials checklist” (see Session 13), distribute a package of field supplies and materials to each team member. Use the procedure that you have established for recording the receipt of these items. There may be some items that you will distribute and for which you need a signature to confirm receipt (usually those that are to be returned after the survey) and other items that do not need a signature. The items will usually have been identified in advance of the training by the survey coordinator. If only one item is needed per survey team or per cluster, it will be given to the supervisor on behalf of the team.
- 6.3 Supervisors will receive all their items in the supervisor-only Session 13. Hand out the “Daily checklist for supervisors” to the supervisors, and ask them to read this over as homework before Session 13.

7. Field activity reports

Explain that the supervisors may be asked to submit a field activity report at the completion of the survey. The report will include a detailed account of the work completed during the survey, and may be used to record the day’s events, problems encountered or lessons learnt for future surveys. Stress that the supervisors will need to have the interviewers’ cooperation and inputs to make sure that the reports contain correct information and are comprehensive.

8. Meeting the drivers/transport review

If possible, an opportunity should be arranged for the survey teams (or, at least the supervisors) to meet the drivers.

HANDOUT

Our team's survey movement plan/schedule

Team number:

Team members: (Supervisor)

..... ; ;

Total number of clusters assigned:

Day/date	Cluster number	Cluster name	Comment

Date team's survey movement plan completed by team:

PLEASE RETURN THIS PLAN TO THE SURVEY COORDINATOR

SAMPLE FORM

Payment schedule

Activity: RAMP survey training

Date (day/month):

	Name	Rate	No. of days	Amount	Received Signature necessary
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
...					

Session 13 **Getting ready for the field (Part 2)** **Supervisors-only session**

Overall goal	To ensure that the supervisors are fully prepared to carry out their responsibilities during the field activities
Objectives	<p>By the end of this session, supervisors will be able to:</p> <ul style="list-style-type: none"> • explain the fieldwork procedures for the selection of households to be interviewed • describe the data quality procedures to be followed at the end of the work in each cluster • describe the communications protocol • describe a typical day in the field
⌚	180 minutes
Methods	Presentation by trainer, large group discussion, small group discussion, quiz
Materials/ preparation	<ol style="list-style-type: none"> 1. As described in Session 12, section 6.3, and using the sample “Field supplies and materials checklist”, compile all remaining supervisor-only materials and supplies into a “package” for each supervisor. Compile all interviewer remaining materials and supplies into a “package” for each interviewer. 2. Print one copy of the “Field supplies and materials checklist” for each supervisor. 3. Write the “Session objectives” of this supervisor-only session on a flipchart. 4. Print one copy of the handout “Daily checklist for supervisors” for each supervisor. Provide this handout to the supervisors in advance of this session and ask each person to read it as homework before the session. 5. Read through the trainer’s technical note on “Data quality procedure: monitoring cluster numbers and household numbers on all rosters, and person line numbers on the persons and net rosters”. 6. Print one copy of the quiz for each supervisor. Print one copy of the “Quiz answer key” for the trainer. (Additional quiz questions can be developed by the trainer or the survey coordinator.)
Steps	<p>1. Introduction (10 minutes)</p> <ol style="list-style-type: none"> 1.1 Provide each supervisor with their package of supplies and materials for the fieldwork. Describe the contents of the package, and point out if an item is also included in the interviewer’s package or if it has been given only to the supervisor. Tell the supervisors how many paper copies of the questionnaires have been provided, and reinforce that these questionnaires are to be used only if needed (for reasons, for example, such as mobile phone equipment failure). Distribute a copy of the “Field supplies and materials checklist” to the supervisors. 1.2 Say: <i>Welcome to this supervisor-only session. In this session, we want to make sure that you, the supervisors, are fully prepared to carry out your roles and responsibilities. You have received a package of materials that you will use in the field. During this session, you will spend time on technical issues as well as logistics and administration issues. As we go through the session, you will find the materials that we refer to in your package, or you will have received them in a previous session. You will need to check that you have all the necessary materials and supplies by comparing them to the “Field supplies and materials checklist”.</i> 1.3 Post the flipchart with the session objectives. Read them out loud. The objectives are as follows:

Session objectives

- By the end of this session, the supervisors will be able to:
- explain the fieldwork procedures for the selection of households to be interviewed
- describe the data quality procedures to be followed at the end of the work in each cluster
- describe the communications protocol
- describe a typical day in the field

Ask if there are any questions about these objectives and respond to any concerns expressed.

2. A day in the field (10 minutes)

- 2.1** Refer to the “Daily checklist for supervisors” (that each supervisor had previously received (see Session 12) and should have read). Ask for a volunteer to read the points on the checklist. Ask if there are any questions or comments. Tell the supervisors that detailed information about some of the procedures and the data quality tools that should be used in the field will follow. Assure them that by the end of this session it is expected that all the daily activities will be well understood.

Tell the supervisors that the next activity will focus on the technical aspects of some of the field procedures: (1) the procedures related to segmentation and the random selection of households, (2) procedures for ensuring the quality of data, with a focus on those areas that can be a source of data error, (3) the viewing and editing of data, and (4) monitoring the performance of the interviewers.

3. Field procedures: selecting households to be interviewed (55 minutes)

- 3.1** Stress the importance of correct field procedures and let the supervisors know that they will be the leaders in the field in ensuring that segmentation and the random selection of households to be interviewed is carried out correctly. Ask a volunteer to describe to the group the stages and steps involved in selecting households to be interviewed and to mention the job aids or tools that should be used. If desired, the person can use a flipchart to list or illustrate the steps. Draw upon the other supervisors to correct or add information, if needed.
- 3.2** Then, allow time for each supervisor to review their team’s survey movement plan, and ask that they each select one cluster that their team has been assigned to survey. Moving from supervisor to supervisor, review the estimated number of households in that cluster and discuss what will be the approach for the cluster, asking, for example:

➔ *Given the number of households do you think that segmentation will be needed? If yes, how many segments do you feel might need to be created? How will you select the segment from which the households will be surveyed? (prompt: Will you use the Segment identification form?) Once you have selected the segment, how will you complete the task of mapping and listing/numbering all the households in the segment? (prompt: Will you prepare a sketch map?) If there is a housing structure in the cluster but the family has not lived there for some time (more than three months) will you include this household in the map? What can you do to make sure that the “squares” on the Sketch map type 2 each represent one household and not a dwelling in which there is more than one household? How will you select the ten households to be interviewed (prompt: Will you use the Random numbers table?). How will those households that have been selected to be interviewed be assigned a household number? (prompt: Will you use the form List of households for random sampling?) What will you do if, when the interviewer arrives at a dwelling, there is more than one household living there? (prompt: Will you give those households additional household numbers once advised by the interviewer of the situation? Will the interviewer thus interview more than one household in that dwelling?)*

Variations: when carrying out this activity, the other supervisors can be invited to listen and contribute to the discussion, or the activity can be done as a paired exercise, with two supervisors working together.

4. Field procedures: data quality procedure for monitoring cluster numbers and household numbers on all rosters, and person line numbers on the net roster (20 minutes)

4.1 Say: *As supervisors, you play a very important role in ensuring high quality data are collected in this survey. At the end of the interviews in an assigned cluster, one of your responsibilities will be to meet with the interviewers on your team and carry out a number of tasks that are designed to reduce errors connected to a mismatch between:*

- *cluster and household number actually surveyed and what is recorded in the databases*
- *person line number (as written on the Persons roster and who slept under which net last night job aid) and person line numbers of those sleeping under a net last night (as entered in the net roster in the mobile phone).*

In a minute I will outline what those tasks are. You need a few tools to be able to follow along with me. Please have in front of you the forms Monitoring cluster, household and person numbers on the rosters, Recording of potential data quality issues and the job aid Persons roster and who slept under which net last night.

As you describe the following tasks, refer to the related tools. (To prepare for this activity, you should refer to the trainer's technical note on "Daily quality round".)

4.2 When you work in your assigned clusters you are expected to do the following:

At the beginning of your team's work in a cluster:

- After the household mapping and numbering of the households is done, assign households to be interviewed by each interviewer. These numbers should be consecutive, from one to ten.
- Note this information on the *Monitoring cluster, household and person numbers on the rosters form* (column 2, consecutive household number). Remind the interviewers also to write down which households they have been assigned to interview. (Note: for each cluster, you will have two sets of household numbers: you will have (a) the "household map number" that was assigned when you did the mapping and listing of households and (b) the "consecutive household interview number" (the number from one to ten given to the assigned households before the interviews.)
- Remind the interviewers to complete the job aid *Persons roster and who slept under which net last night* for each household that they interview.

Upon completing all household interviews in the assigned cluster:

- Ask each interviewer to tell you the name of the household head (available at the time of the interview) and household number for each household that he/she interviewed. If no one was at home and an interview was not carried out then a final attempt to interview that household should be made before the team leaves the cluster.
- Ask the interviewers to give you the completed job aid (*Persons roster and who slept under which net last night*) for each household that they interviewed.

5. Field procedures: ensuring data quality by viewing records and editing data (10 minutes)

The following procedures will be carried out **only if** the supervisors have been assigned the responsibility of viewing data on the mobile phone before they are sent to the server.

- 5.1 At the end of the day, **before data are sent to the server**, check all phone data records for each household surveyed to ensure that the following are correct:
1. cluster and household number in the household questionnaire
 2. cluster, household, and person number in the persons roster
 3. cluster, household, and person line number in the net roster

To verify these data you will need to view the interviewer's records.

- 5.2 After viewing the data, if an error is found, and if this is part of your responsibility, you will edit the data, entering the correct data. You will do this using the Edit function of EpiSurveyor. Then the following procedures must be followed:
- Fill out the form *Monitoring cluster, household and person numbers on the rosters*. Fill in column 8 with a Yes if a data error has been found. Make sure that you notify the survey coordinator or data manager about the error(s) by recording them on the form *Recording of potential data errors*, and indicating whether you have edited the data and resolved the issue or not. If there have been no data issues for the whole cluster, write NO DATA ISSUES in the first box on the *Recording of potential data errors* form.
 - At the end of each day (or when you next see the survey coordinator or data manager) you will give the completed forms *Monitoring cluster, household and person numbers on the rosters*, *Recording of potential data quality issues* and all the job aids for the households interviewed in that cluster to the survey coordinator or data manager. These forms will be reviewed and left with them.
- 5.3 Review with the supervisors the procedures involved in viewing and editing data on the mobile phone. Ask if there are any questions about the procedures. Ask other supervisors to respond to any questions and only answer if no one else can do so.

6. Field procedures: monitoring interviewer performance (5 minutes)

- 6.1 Stress that one of the most important roles of the supervisor is to monitor the work of the interviewers. Observing interviews is an appropriate way to do this. The supervisor should plan to observe each interviewer carry out interviews. It is helpful to observe the interviewers more frequently at the beginning of the survey (for example, during the first two days of the interviews). Based on the observation of the interview, feedback should be provided. The supervisor can mention both the positive aspects of the interview as well as any problems or errors. Suggestions for improvement should be provided.
- 6.2 A meeting with the entire team to discuss the quality of their work should be held every day.
- 6.3 **Only if** the survey coordinator has instructed the supervisor to carry out re-interviews as part of the fieldwork procedures, re-interviews need to be done to check the accuracy of the data collected by the interviewers. In a re-interview, the supervisor conducts an interview in a household that has already been interviewed, and the results are compared with those collected by the interviewer. The re-interviews should be done for some of the households interviewed by each interviewer (for example, for five to ten households per team during the course of the survey).
- 6.4 Tell the supervisors that a daily "quality round" will be held at the end of each day of fieldwork on the return of the teams from the field to a central site. All supervisors are expected to be present. Its purpose is to review the work carried out in the field and ensure data quality and adherence to the correct field procedures. The meeting provides the chance to give further instruction as needed.

Wrap up this session on field procedures and technical issues by asking if there are any questions about the tasks and tools related to ensuring high quality data, and clarify as needed. Variation: give the supervisors time to discuss this information among themselves, and when the time is up, call them together and ask one of them to volunteer to explain the tasks and the use of the tools in front of the group. Invite the other supervisors to offer comments too. Correct the information if needed, and thank the supervisors for the attention they gave during this important activity about some of the technical issues involved in the survey out in the field.

7. Quiz (15 minutes)

Distribute one copy of the quiz to each supervisor. Divide the supervisors into pairs. Tell them that they can work together to complete the quiz. Inform the groups of the time limit to complete the quiz (8 minutes).

When the time is up, ask the groups to reassemble. Read each question out loud, and ask for a volunteer to provide the answer. Correct the answer if needed, and reinforce the key messages. Continue with this procedure until all the questions have been answered. Thank the group for their participation.

Variation: this activity can be carried out with all participants, before the final session.

8. Communications and contacts (10 minutes)

Communications with district and local authorities

- 8.1** Provide information about the communications that have been made in advance (usually by the survey coordinator) to inform district or local authorities about the survey. Distribute one copy of the letter of authorization for the survey to each supervisor. In addition, tell the supervisors about any other communications that have been made (e.g., radio announcement, meetings with local organizations, announcements made by the village crier, etc.). Provide any other information that you may have about the local authorities and organizations (e.g., Red Cross Red Crescent National Societies, health facilities). Stress the importance of obtaining local permission when in the area to do the survey.

Communications with the survey teams

- 8.2** Communications between the team supervisors and the survey coordinator must be established for the whole duration of the data collection period. This will usually involve the use of mobile phones. Ask supervisors to look at the *Communications protocol* in their package of materials. Ask a volunteer to read the instructions out loud. Discuss the instructions, and answer any questions.
- 8.3** Tell the supervisors that you know there may be times when communications will be difficult, but that it is very important to stay in touch every day. Give some examples of why this is so important. For example, everyday contact can ensure the safety of the team and help in monitoring the progress of each survey team. Lack of contact can leave the survey coordinator with the wrong information about a team's movement and could lead to ineffective planning of monitoring visits by the survey supervisory and monitoring support team.

Field activity reports

- 8.4** Explain that it is the supervisor's responsibility to complete a field activity report. (This can be an optional requirement in a survey.) This report will be prepared by the supervisor while in the field, and submitted to the survey coordinator when the survey is completed. The report helps the supervisor to manage his/her field responsibilities and keep a detailed account of the work completed. The report may be used to record problems encountered or lessons learnt for future surveys. Ask supervisors to look at their copy of the *Field activity report template* and review the template, pointing out the expectations for completing and submitting the report.

9. Equipment, materials and supplies distribution (20 minutes)

- 9.1** Ask each supervisor to come forward, one at a time, to review the bundle of field equipment and supplies and materials that have been assembled for their team.
- 9.2** Using the *Equipment sign-out* sheet arrange for each supervisor to check that all the equipment and materials are there. Ensure that each supervisor signs the sheet, confirming that he/she has received the items. The supervisor should also ask each interviewer to sign the form, indicating that they have received a mobile phone and charger for use during the survey. Tell the supervisor the date on which they should return these items and the place.

Let the group know that all supplies and materials will be distributed to the interviewers in the afternoon session. This will be done by teams, and the supervisor is expected to join their team when the distribution takes place.

10. Transport review (5 minutes)

- 10.1** Provide information about the transport arrangements. If feasible, arrange for the drivers to come to the session, and introduce the drivers to the supervisor (and team members, if possible) to whom they are assigned. Emphasize the importance of following safe practices, such as avoiding driving at night and being aware of any security issues in the areas that are on their travel routes.

If a team will face expenses because a means of transport such as boat or motorcycle needs to be used to reach a cluster, make sure that this issue is discussed and adequate funds are provided to the supervisor. Tell the supervisor how these funds will be accounted for (e.g., on an expense form).

- 10.2** Ask if there are any questions. Remind the supervisors that they should not hesitate to contact the survey coordinator while they are in the field (or before departing for the field) if they have any questions or if problems arise.

11. Other logistics and administrative issues (15 minutes)**Field expenses**

- 11.1** It is important to ensure that the supervisors leave for the field with the funds that may be needed for the field expenses that they are to manage. This may include money for transport expenses such as fuel and incidental repairs, for local guides or translators, local transportation, and so on.
- 11.2** Call out the names of each supervisor, and on a one-on-one basis, distribute the funds for field expenses to them. This activity can take place at the same time as another activity is going on. Use the form that has been designed to record this transaction and ensure that it is signed by each team supervisor.
- 11.3** Ask if there are any other logistics or administrative questions that have not yet been addressed.

12. Wrap-up (5 minutes)

Explain to the supervisors that before this training is over, there will be one final session for everyone. In that session, there will be a last opportunity to review outstanding issues, and that all field teams will leave the training having received their field equipment, supplies and materials.

Thank the supervisors for their efforts and participation during the training course, and emphasize that the role they will play during the survey is critical to the success of the survey.

HANDOUT

Daily checklist for supervisors

1. Know which cluster your team is assigned to survey each day. Review the data collection plan as a team and with each interviewer. Make a preliminary determination of whether segmentation (and sub-segmentation) in the field will be required. If required, make an estimate of the number of segments to be created (based on the estimated population size (number of households) of the cluster.)
2. If feasible, in advance of arriving at an assigned cluster, contact a local person (e.g., community health worker, Red Cross or Red Crescent volunteer) and ask for a sketch map to be prepared. The sketch map will be used to help you segment the cluster and get to the point where you have a segment of about 15 to 20 households. This will be the segment from which you will randomly select ten households to be interviewed. Note that a request for a rough sketch map may have already been made by the survey coordinator.
3. In each assigned cluster, explain the survey and its objectives to local authorities and local guides, and cooperate with these people throughout the process.
4. Organize the equipment at the beginning and end of each day (e.g., charge mobile phones, and ensure that the team has the necessary field supplies and materials).
5. In the field, carry out a leading role in segmentation, household mapping and numbering in each cluster assigned to your team. Sub-segmentation may need to be carried out, depending on the estimated number of households in the cluster. Use the *Segment identification form* and the *Sketch map type 1* in each cluster, and keep these to return to the survey coordinator. Use *Sketch map type 2* to map all households in the selected segment/sub-segment. Assign a number to each of the households drawn on the map. Use the *List of households for random sampling* to list the randomly-selected households. Assign the households to be interviewed, giving each interviewer a batch of households that are reasonably close together, to save time between interviews. Make a note of those households to be interviewed. There will be two sets of household numbers: (a) the “map household number” that was assigned when you do the mapping and listing of the households, and (b) the “household interview number”/“household number” (the consecutive number from one to ten that was given to each of the randomly-selected households assigned to interview).
6. Monitor the performance of the interviewers. This should include observing interviews carried out by each interviewer and providing feedback based on observations. If re-interviews are part of the field procedures, carry out re-interviews of some households.

7. Confirm that attempts have been made to interview ten households in each cluster. Use the form *Monitoring cluster, household and person numbers on the rosters* to record if a household was interviewed. If no one was at home to be interviewed, then there may be fewer than ten households interviewed in the cluster and shown in column 5. If a household was not interviewed, then a second attempt should be made before the team leaves that cluster. Confirm with the interviewer that he/she entered this information in the household questionnaire, entering “No, not interviewed” for the question “Interviewer was able to interview member of this household?”
8. Follow the communication protocol.
9. Follow data management procedures. Use the form *Recording of potential data quality issues* for each cluster to note data quality issues and the possible resolution of those issues. If you have been assigned the role of viewing and editing data records, ensure that you view the records from each interviewer, paying special attention to the procedure for monitoring the cluster numbers and household numbers on all rosters, and person line numbers on the net roster. Edit the record if an error has been found. Use the form *Monitoring cluster, household and person numbers on the rosters* (one page per cluster), completing columns 6 to 8. Ensure that your team sends data to the server every day.
10. Maintain daily contact with the survey coordinator to provide an update about the work completed, challenges encountered, data quality issues, security, etc. Compile and submit the required documentation every day: the completed *Segment identification form*, *Sketch map type 1* of the cluster, *Sketch map type 2* of households for simple random sampling, *List of households for random sampling*, the form *Monitoring cluster, household and person numbers on the rosters*, the completed *Persons roster* interviewer job aids (one per household interview) and the form *Recording of potential data quality issues* (one per cluster).
11. Depending on the survey, the survey coordinator may request that additional materials be returned: for example, written signed informed consent forms, a daily log of fieldwork, etc.

List of households for random sampling

Cluster			Team supervisor			Date:		
Map household number (number of the household from the map of households)	Selected at random (mark with an "X")	Household interview number (consecutive household number assigned for households chosen at random (and marked with an "X" in column 2)	Map household number (number of the household from the map of households)	Selected at random (mark with an "X")	Household interview number (consecutive household number assigned for households chosen at random (and marked with an "X" in column 2)			
-1	-2	-3	-1	-2	-3			
1			26					
2			27					
3			28					
4			29					
5			30					
6			31					
7			32					
8			33					
9			34					
10			35					
11			36					
12			37					
13			38					
14			39					
15			40					
16			41					
17			42					
18			43					
19			44					
20			45					
21			46					
22			47					
23			48					
24			49					
25			50					

**TRAINER'S
NOTE****Data quality procedure:
Monitoring cluster numbers
and household numbers on all
rosters, and person line numbers
on the persons and net rosters****Trainer's briefing notes**

This procedure ensures that the cluster and household numbers on all rosters, and person line numbers in the persons and net rosters, are correct.

1. After the household mapping and listing is done, the supervisor assigns the household numbers to be interviewed. Numbering of the households in batches can be helpful: e.g., household numbers 1 to 4, 5 to 8 and 9 to 10 (if the team supervisor takes on the role of interviewer in the cluster). If there will be two interviewers, one person can be responsible for household numbers 1 to 5, and the other for household numbers 6 to 10.
2. Supervisor makes a note on the data quality monitoring form called *Monitoring cluster, household and person numbers on the rosters* of which households are to be interviewed (column 2), by which interviewer (column 3). Each interviewer should make a note of which households they have been assigned to interview.
3. At the time of the household interview, the interviewer records the cluster number, household number and the name of the head of household on the job aid *Persons roster and who slept under which net last night*.
4. At the end of the survey in that cluster, the interviewer tells the supervisor the name of the head of household (available at the time of the interview) and household number for each household that he/she interviewed. The interviewer hands over to the supervisor the *Persons roster* interviewer job aids for those households that he/she has interviewed.
5. Supervisor completes the *Monitoring cluster, household and person numbers on all rosters* form. The supervisor notes if the household has been interviewed (column 5). If it has only been visited one time then arrangements should be made to visit the household again to complete the interview. If no one is home at the second visit, the supervisor will record that the household was not interviewed. In

this case, there should be no replacement household allocated. The interviewer will enter this information in the household questionnaire, entering “No, not interviewed” for the question “Interviewer was able to interview member of this household?”

6. If the supervisor has been assigned the responsibility of viewing and editing data: at the end of the day, *before data are sent to the server*, the supervisor checks all mobile phone data records for each household interviewed to ensure that the following are correct:
 - a. cluster and household number in the household roster
 - b. cluster, household, and person number in the persons rosters
 - c. cluster, household, and person line number in the net rosters
7. If an error is found the supervisor will edit the data, entering the correct data before the data are sent to the server. The supervisor will complete columns 6, 7 and 8 of the *Monitoring cluster, household and person numbers on all rosters* form. If an error has been found the supervisor should record it on the form *Recording of potential data quality issues*, using one form per cluster. Any data issues that arose during the fieldwork in that cluster and the possible resolution of the issues should be recorded. If no data issues arose in that cluster, the supervisor will write “No data issues” in the first box of the form. At the end of each day, the supervisor gives the *Monitoring cluster, household and person numbers on the rosters* form, the *Recording of potential data quality issues* form and all the interviewer job aids (*Persons roster and who slept under which net last night*) for the households interviewed in that cluster to the survey coordinator or survey data manager for review.

SAMPLE FORM

Monitoring cluster, household and person numbers on the rosters

Use ONE PAGE PER CLUSTER. Return completed form to the survey coordinator or data manager at the end of each day

Cluster number: Cluster name: Supervisor:

Interview date (dd/month):

Map household (HH) number	HH interview number*	Interviewer	Name head of HH (available at time of interview)	Interviewed Yes/No	Supervisor was instructed to review data on the mobile phone		
					Supervisor verified phone cluster and HH numbers in the HH and persons roster Yes/No	Supervisor verified person line numbers (and cluster and HH numbers) in the net roster Yes/No	Data error(s) found (if Yes, ensure that form Recording of potential data quality issues is filled in) Yes/No
-1	-2	-3	-4	-5	-6	-7	-8
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							

* Note: No replacements or alternate households are used. More rows should be added if the number of households to be interviewed is increased from ten.

SAMPLE FORM

Random numbers by intervals tables

Selecting households to be interviewed

Example 1

		Number of households mapped in the segment from which to sample households using SRS				
		1 to 15	1 to 20	1 to 25	1 to 30	1 to 40
Households to be sampled	1	13	10	11	22	5
	2	3	5	16	3	35
	3	14	18	22	23	26
	4	1	13	4	5	13
	5	5	8	20	20	20
	6	10	2	1	26	16
	7	8	1	21	11	8
	8	6	3	2	21	2
	9	4	15	14	6	4
	10	9	4	12	7	18
	11	2	14	13	28	38
	12	11	16	10	13	28
	13	7	9	9	9	14
	14	12	19	6	17	40
	15		11	19	27	7
	16	-----	12	17	14	11
	17	-----	7	15	15	36
	18	-----	17	8	2	21
	19	-----	6	24	19	9
	20	-----		7	8	19

**SAMPLE
FORM****Random numbers
by intervals tables****Selecting households to be interviewed****Example 2**

		Number of households mapped in the segment from which to sample households using SRS					
		1 to 10	1 to 15	1 to 20	1 to 25	1 to 30	1 to 40
Households to be sampled	1	5	10	10	11	3	9
	2	9	11	15	20	12	13
	3	6	12	2	17	19	18
	4	4	15	9	7	16	31
	5	8	2	19	13	18	37
	6	1	7	11	22	1	5
	7	3	1	1	25	11	6
	8	7	9	14	24	20	33
	9	10	13	6	21	26	40
	10	----	14	18	23	8	21
	11	----	3	4	5	13	34
	12	----	4	7	8	2	26
	13	----	8	16	9	4	1
	14	----	6	3	19	9	24
	15	----	5	8	14	17	36
	16	----	----	5	15	21	4
	17	----	----	12	10	15	30
	18	----	----	20	12	25	19
	19	----	----	17	4	29	35
	20	----	----	----	16	23	28

SAMPLE FORM

Recording of potential data quality issues

Use ONE FORM PER CLUSTER. Return completed form to the survey coordinator or data manager at the end of each day.

Cluster number: **Cluster name:** **Supervisor:**

Record data issue and possible resolution of issue. Record interviewer's name and household number (if pertinent). If no data issues for the whole cluster, write NO DATA ISSUES in the first box.

1.

2.

3.

4.

5.

**SAMPLE
FORM****Field supplies and materials
checklist**

Item	Number needed per field survey team member (interviewers and supervisors)	Available (✓)
ESSENTIAL		
Letter to authorities	1	
Identification badge	1	
Informed consent script	1	
<i>ITN labels and packaging</i> job aid (pictorial sheet)	1	
<i>Medicines used to treat fever and malaria in children</i> job aid (pictorial sheet or list of medicines used in area)	1	
<i>Persons roster</i> interviewer job aid	Number of interviews that will be completed by each team member + 10% extra	
Informed consent script interviewer job aid	1	
Ballpoint pen	1	
Clipboard	1	
OPTIONAL		
Team t-shirt, cap, apron, etc.	1	
Bag to carry field supplies	1	
Raincoat or umbrella	1	
Rubber boots	1 pair	
SUPERVISORS ONLY		
Contacts list	1	
Communications protocol	1	
Survey movement plan/schedule	1	
Maps	1 area map for district/region 1 map of each selected cluster	
<i>Monitoring cluster, household and person numbers on the rosters</i> form	1 per cluster	
<i>Recording of potential data quality issues</i> form	1 per cluster	
<i>Segment identification</i> form	1 per cluster (more if sub-segmentation will be needed)	
<i>Sketch map type 1</i> form	1 per cluster (more if sub-segmentation will be needed)	
<i>Sketch map type 2</i> form	1 per cluster	
<i>List of households for random sampling</i> form	1 per cluster	
Random numbers tables	3 per survey team	
Paper version of questionnaires (in case of network or mobile phone malfunction)	3 per survey team	

SAMPLE FORM

Communications protocol: staying in touch

Survey supervisory support and monitoring team (SSMT):

- ▶ 0736880xxx (survey coordinator)
- ▶ 0718489xxx (command centre/data manager)
- ▶ 0729910xxx (other member of SSMT)

Sending a daily text message

A text message should be sent to the survey coordinator (0736880xxx) at the end of each day. If you do not have mobile phone reception in the area you must send the text message as soon as you have reception. Ensure that you have at least one mobile phone on your team that uses <the mobile phone service provider for the survey area>.

The message should contain the following:

Team number:

Supervisor name:

Date of the survey: ensure that you have the correct date if you have had to wait for mobile phone reception to send the text

Cluster surveyed: provide cluster number and name

Total number of households interviewed today:

Cluster to be surveyed tomorrow: provide cluster number and name

Problems: No/Yes. If yes, give an indication of the problem

If the SSMT receives a text with a « Yes » response to “Problems” and we have not yet heard from you, the survey coordinator will try to contact you immediately. In case of an **emergency**, contact a member of the SSMT immediately/as soon as possible.

For mobile phone technical support

Call the command centre:

- ▶ 0718489XXX

**SAMPLE
FORM****Contacts list**Survey supervisory support and monitoring team
(SSMT)

Name	Mobile phone number(s) ¹⁵ (indicate network service provider(s))
AAA (survey coordinator)	0736880xxx (e.g., CelCom) 094431xxx (e.g., GoMobile)
BBB (command centre/data manager)	0718489xxx (CelCom)
CCC (member, SSMT)	0729910xxx (CelCom)

RAMP survey teams

Team number	Supervisor name/phone number(s) (indicate network service provider(s))	Interviewer's name/phone number(s)	Driver's name/phone number(s)
A			
B			
C			
D			
E			
F			

15 It can be helpful to provide mobile phone numbers with more than one service provider so that the risk of not being able to communicate with a team is reduced in case of variability in network coverage during the survey.

SAMPLE FORM

Equipment sign-out sheet

Team number:

Team supervisor:

Item	Received (✓)	Returned (✓)
MOBILE PHONE (person's name and phone's identifier number) and CHARGER		
1.		
2.		
3.		
4.		
VEHICLE CHARGER FOR MOBILE PHONES (1 per team)		
POWER BAR (1 per team)		
MAP: AREA MAP		
MAP: CLUSTERS		

Received:

Supervisor signature: Date:

Returned:

Survey coordinator signature: Date:

HANDOUT**Quiz**

Below are eight statements about fieldwork. Some of them are true and some of them are false. Please put a checkmark beside “true” if you think it is a true statement or beside “false” if you think it is a false statement.

1. Segmentation needs to be done for all sample clusters.
True False

2. When the sketch map (type 1) is made to create segments for the cluster it is essential that the number of households is accurately counted. True False

3. Listing of all households in the final segment is needed to ensure that households have an equal chance of selection for an interview. True False

4. If no family has been living in a housing structure for some time (more than three months) and it is not known when they are returning, this household should be excluded from the map of households made for the survey. True False

5. If a household refuses to participate you must replace that household with another one. True False

6. If a cluster has more than 100 households then it must be segmented before you can select the households to be interviewed. True False

7. If no one is at home at the household selected to be interviewed then the interviewer must visit the household at least once more. True False

8. When a segment has 20 households you must break it down into smaller units before you begin the mapping and listing of households. True False

TRAINER'S NOTE

Quiz answer key¹⁶

Trainer's briefing notes

1. False. A cluster needs to be segmented only if it is too big to map conveniently and count all the households in it. If there are more than 50-plus households in the cluster, then always segment. If there are fewer than 50 households, then segment into two to three segments or use simple random sampling.
2. False. For the purpose of making segments, absolute precision in the count of the households is not needed. The map needs to show the relative density of the population (usually expressed as number of households) in each segment. An estimate of the number of dwellings can be used instead of counting households. You do not need to knock on doors to inquire about the number of households or the names of the household head. For estimating the size of the cluster, in RAMP terminology a household means both a dwelling structure and the household unit, with the understanding that there may be several households within a dwelling.
3. True. This must be done to ensure that the sampling of households is carried out without selection bias.
4. True. Do not draw that household on the map and thus, it will not be numbered or be chosen to be interviewed.
5. False. If you do not obtain consent then you do not replace that household with another one. In the household questionnaire you will have a record of this: you will enter "No" for the question "Consent obtained".
6. True. A cluster of more than 100 households is too big to map all the households and carry out interviews.
7. True. If no one is at home at the first visit, the interviewer must revisit the household at least once more. If it is not possible to do an interview then the interviewer must enter "No, not interviewed" for the question "Interviewer was able to interview member of this household?" in the household questionnaire. The supervisor will also write that this household was not interviewed (column 5, form *Monitoring cluster, household and person numbers on the rosters*).
8. False. For the malaria survey, the smallest segment should be around 15 to 20 households.

¹⁶ This is a sample set of questions for a quiz. The survey coordinator and training team are encouraged to develop a longer set of true/false questions. These could be used to test knowledge and reinforce learning at different points in the training (and not only with the supervisors).

Session 14 Training summary and evaluation

Overall goal	To bring closure to the training
Objectives	By the end of this session, the interviewers and supervisors will have: <ul style="list-style-type: none"> asked final questions about the training and the imminent fieldwork completed an evaluation of the training
	60 minutes
Methods	Evaluation form completion, large group discussion
Materials/ preparation	<ol style="list-style-type: none"> Print one copy of the evaluation form “Summary evaluation” for each participant.
Steps	<ol style="list-style-type: none"> Completion of training evaluation (10 minutes) <ol style="list-style-type: none"> Introduce the session by saying that this is the last session together before the teams head out to the field. There is an evaluation of this training that everyone must complete. Explain that you would like to know what they thought of the training. Stress that their feedback is important to the survey managers and that the feedback will be used to improve future training workshops. Tell the participants that they do not have to provide their name unless they would like to. Distribute one copy of the evaluation form to each participant, and give them 5 to 10 minutes to complete it. Collect the completed evaluation forms and thank the participants for taking the time to complete the evaluation. Closing activity (50 minutes) <ol style="list-style-type: none"> Ask the participants if they have any final questions or comments. Ask other participants to respond to any questions and only answer if no one else can do so. Thank the participants for their participation during all the activities of the training. Wish the teams every success during the fieldwork and safe travels. You may decide to ask the survey coordinator or someone from the Red Cross Red Crescent to make some closing remarks. Mention that you will see all of them after the survey in the post-survey session. Tell them that in that session the participants will need to return the mobile phones and will receive their certificates of participation.

HANDOUT RAMP survey training evaluation

Summary evaluation

Training dates:

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Regarding the overall training, please rate the following:					
1. What is your overall rating of this training	<input type="radio"/>				
2. How satisfied are you with the format of the training?	<input type="radio"/>				
3. How satisfied are you with the field practice(s)?	<input type="radio"/>				
4. How satisfied are you with the trainers?	<input type="radio"/>				
Regarding the course materials, please rate how satisfied you were with the following:					
5. The course handouts?	<input type="radio"/>				
6. The interviewer job aids?	<input type="radio"/>				

7. Overall, how confident are you that you can successfully carry out the survey?

Very confident

Not very confident

8. What was the best part of the training?

9. What did you like least about the training?

10. Other comments or suggestions:

Name: (optional)

**Thank you for taking the time to complete this evaluation.
 We are planning future training and your feedback will help us to make improvements.**

Session 15

Post-survey reflection and debriefing

Overall goal	To provide a sense of closure to the survey participants and allow the survey organizers to gain insights from the interviewers
Objectives	By the end of this session, participants will have: <ul style="list-style-type: none"> • gained knowledge about the preliminary survey findings • reviewed and analysed the survey experience and provided feedback to the organizers • received a certificate of participation
🕒	150 to 210 minutes
Methods	Presentation, small group exercise, large group discussion/debriefing, presentation of certificates
Materials/ preparation	<ol style="list-style-type: none"> 1. Review the agenda and make adjustments, as appropriate. The duration of the session should be adjusted to reflect the time needed to complete all activities. 2. Write the agenda points on a flipchart paper. 3. Print one copy of the agenda for each trainer. 4. Obtain the e-file <i>Preliminary survey results bulletin</i> (in PDF format, from the data analyst). 5. Print one copy of the survey bulletin for each member of the survey supervisory support and monitoring team (SSMT) and invited guests. 6. Set up the LCD projector, laptop and screen. 7. Print one copy of the handout “Reflecting and learning from the RAMP survey experience” for each participant. 8. Prepare a flipchart that provides guidance for the small group exercise on “Reflecting and learning from the RAMP survey experience”. 9. Obtain flipchart paper sheets and markers and tape for each small group. 10. Prepare a laminated certificate of participation for each eligible participant.
Steps	<ol style="list-style-type: none"> 1. Introduction (5 minutes) <p>Welcome everyone to this session, and thank them for agreeing to take part in it after their very busy time spent in the training and in the field. Go over the agenda for today’s session. Ask if there are any questions about the plan for this session.</p> 2. Preliminary survey results (40 minutes) <p>Share information about the preliminary results with the participants. The type and extent of data shared will depend on the status of the data analysis activity.</p> <p>If there is an internet connection, it would be possible to connect to the web-based database and view the data from the survey. If the preliminary survey bulletin is completed, present the findings reported in this bulletin.</p> <p>As the data results are being shown, ask the participants for their comments. If there are findings that are surprising or unexpected the participants may be able to offer ideas or explanations to aid in interpreting them. Variation: identify questions about the survey findings and ask the participants to have a discussion with their neighbour to identify possible reasons for the findings.</p>

At the end of this exercise, thank the participants again for their work, and remind them that we have just seen the data that *they* collected through the household interviews. Explain that these are preliminary results and analysis work will continue before a survey report is produced. The results will be shared and discussed with decision-makers, so that action can take place.

3. Reflecting and learning from the RAMP survey experience (70 minutes)

Say: Congratulations! You have just completed the training and fieldwork for the RAMP survey. You have worked as a team. You have used a mobile phone to collect data for each of the household interviews and to send the data to the server. We would now like you to take time to discuss your survey experience. To think about it. To analyse it. Discuss it together. Learn from it. Share your views.

- 3.1** Tell the participants that they will now all take part in an exercise. Explain the purpose of the exercise: that is, the participants will discuss their survey experience and provide feedback to the organizers. Tell them that this exercise will allow them to share their experience and what they have learnt. They will do this as a group, not as individuals. It is important that every person has the chance to express him/herself in this exercise.

In addition to the surveyors, members of the survey supervisory support and monitoring team can also form a group and participate in the exercise.

Ask the participants to form small groups. They should sit with the others on their field survey team. Distribute one copy of the handout “Reflecting and learning from the RAMP survey experience” to each person.

Working in small groups, you will discuss each of the themes that are identified in the handout (participating in the survey, using the mobile phone, working as a survey team member, logistics and administration). To aid in a systematic reflection and analysis, a set of sample questions has been provided on the handout for the exercise. These questions can be used if the group wishes. Their use will help to extract maximum learning from the exercise.

To help understand how the questions can be used it may be helpful to illustrate this by using a prepared flipchart, as follows:

Question	Theme		
	① Participating in survey	② Cell phone	... etc. ③ and ④
What went well?			
Challenges?			
Lessons learnt?			
Recommendations?			

Ask each small group to ensure that there is a note-keeper and a person who will report back the results of their discussion to the plenary. They should use flipchart paper to capture their group’s discussion and should assign a timekeeper to help ensure that the group is able to complete the entire exercise within the time limit. Tell the groups that they have 50 minutes to complete the exercise. When the time is up, you will reassemble the whole group and ask each group to present the results of their reflection on the survey. Ask if there are any questions about the exercise.

Circulate around the room, ensuring that each group is on track, discussing each theme and writing their feedback on the flipchart paper.

Give a five minute warning signal for the groups to complete the exercise. When each group has finished, ask them to post their flipcharts on the wall.

- 3.2** Presentation from small groups. The spokesperson from each group will present the results of their group discussion, theme by theme. This should take two to three minutes per group. Thank each group after their presentation. Do not embark on a discussion after each group presentation, but allow for clarification of any points raised. Try to ensure that the environment is non-judgmental and supportive of the group's work.

After all the groups have given their presentation, synthesize the feedback, mentioning key themes and points that have emerged. Note the greatest successes of the survey experience and the greatest obstacles that have been mentioned. Note the recommendations that have been made. Thank the teams for their efforts, and ask for a round of applause.

It may be useful to keep the flipcharts as a record of this session and use them to prepare a summary of the session. The lessons learnt and recommendations generated from the exercise can be a useful contribution to planning and implementing future RAMP surveys.

4. Presentation of certificates (10 minutes)

Tell the participants that we are now going to award the certificates of participation to each member of the survey teams. These certificates are well-deserved and are a tribute to the successful completion of the training and the fieldwork by each one of the participants. The trainer needs to determine how the certificates will be distributed, and by whom, perhaps by an invited guest. Arrange the set-up so that photographs can be taken, if desired.

Carry out the presentation of certificates. When the distribution is completed, thank all the participants once more for their participation in the survey.

5. Administrative issues (10 minutes)

Take care of any administrative issues that are outstanding: for example, daily allowances, return of excess funds advanced, return of signed receipt of funds from local leaders/local guides, return of maps, return of cell phones and equipment.

6. Closing remarks (10 minutes)

The training team will need to determine how the event will be brought to a close. Activities could include closing remarks by an invited guest, and/or a round that will allow each person to make a final brief remark. Make sure to thank any partners for their hospitality and support. Wish all the best to the participants.

SAMPLE

Post-survey reflection and debriefing agenda

Trainers only

Participants: All supervisors and interviewers; members of the survey supervisory support and monitoring team; invited guests

Date

Venue

Time

Activity	Minutes
Welcome and overview of the agenda	5
Preliminary survey results <ul style="list-style-type: none"> ○ presentation ○ discussion 	40
The RAMP survey: reflecting and learning from our experience <ul style="list-style-type: none"> ○ group exercise ○ report from each group 	70
Administrative issues	10
Presentation of certificates	10
Closing remarks	10

HANDOUT**Reflecting and learning from the RAMP survey experience**

There are a number of themes that we would like you to discuss in your teams:

- ① Participating in the survey
- ② Using the mobile phone
- ③ Working as a survey team
- ④ Logistics and administration

For each of the above themes, please discuss the following:

- What went well?
- Which challenges did you face?
- Lessons learnt
- Recommendations

Below you will find a set of questions under each theme. These are questions to stimulate your thinking. You can use them to help structure your small group discussion.

① PARTICIPATING IN THE SURVEY

- What did you most enjoy about participating in the survey?
- What did you like the least?
- Did you gain any new knowledge or skills as a result of your participation in this survey? If yes, can you give an example?
- What suggestions do you have for improving the training and the field survey? Please identify at least two suggestions.

② USING THE MOBILE PHONE

- Which difficulties did you face in using the mobile phone?
- Which difficulties did you face in sending data to the server?

③ WORKING AS A SURVEY TEAM

- What did you do in your team that helped with teamwork?
- Which lessons did you learn about working well in a team?
- Identify at least two recommendations for working in a team in a RAMP survey.

④ LOGISTICS AND ADMINISTRATION

- What suggestions do you have for improving the survey logistics and administration? Please identify at least two suggestions.

Sample certificate



International Federation
of Red Cross and Red Crescent Societies

Certificate of participation

This certificate is awarded to

<INSERT NAME>

For successful completion of training and fieldwork
using the International Federation of Red Cross
and Red Crescent Societies'
Rapid Mobile Phone-based (RAMP) survey
<INSERT PLACE AND DATE>

<Insert signature,
e.g., IFRC>



International Federation
of Red Cross and Red Crescent Societies

<Insert signature, e.g.,
National Society
Branch Chairman>

<Insert logo(s) of lead
organization/partners>

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The Fundamental Principles of the International Red Cross and Red Crescent Movement

Humanity The International Red Cross and Red Crescent Movement, born of a desire to bring assistance without discrimination to the wounded on the battlefield, endeavours, in its international and national capacity, to prevent and alleviate human suffering wherever it may be found. Its purpose is to protect life and health and to ensure respect for the human being. It promotes mutual understanding, friendship, cooperation and lasting peace amongst all peoples.

Impartiality It makes no discrimination as to nationality, race, religious beliefs, class or political opinions. It endeavours to relieve the suffering of individuals, being guided solely by their needs, and to give priority to the most urgent cases of distress.

Neutrality In order to enjoy the confidence of all, the Movement may not take sides in hostilities or engage at any time in controversies of a political, racial, religious or ideological nature.

Independence The Movement is independent. The National Societies, while auxiliaries in the humanitarian services of their governments and subject to the laws of their respective countries, must always maintain their autonomy so that they may be able at all times to act in accordance with the principles of the Movement.

Voluntary service It is a voluntary relief movement not prompted in any manner by desire for gain.

Unity There can be only one Red Cross or Red Crescent Society in any one country. It must be open to all. It must carry on its humanitarian work throughout its territory.

Universality The International Red Cross and Red Crescent Movement, in which all societies have equal status and share equal responsibilities and duties in helping each other, is worldwide.

For more information on this IFRC publication, please contact:

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Saving lives, changing minds.