PHONE SURVEYS: USE AND ADAPTATION TO COVID-19

PHONE SURVEYS: GENERAL DESIGN

Need verbal consent, may have IRB implications

Incentives given at end of survey in airtime: $1.50 - $3

Timing: no more than 30-40 minutes (longest survey, not average survey)

We make 9 attempts, max 3 per day, 3 hours apart, one day in between

PHONE SURVEYS: TEAM STRUCTURE

Depends on sample size and complexity of the survey

1 research manager [RM] (not full time)
1 research associate [RA] in the field (optional depending on size)
1 data research associate in the US (time differences help!)
1 field manager [FM]
1 senior field officer [SFO] for every 4 to 5 field officers [FOs]

For just one phone survey we can manage with an RM, FM and no RA

TIPS FOR PHONE SURVEYS

1. Create tracking sheets with phone numbers and attempts
   - Make & track appointments if respondent is busy (evenings or weekends). We do this on the tracking sheet and in survey CTO
   - Submit one survey with "could not reach respondent" every 3 calls

2. Strict protocol on what to do if the person who answers the phone is not the target respondent on the tracking sheet
   - We ask the person who answers whether they know the target respondent, if so, collect the correct number for target person
   - If they don't know the target, we try to reach someone else in original HH by phone (collect as many numbers as possible at baseline/now)

TIPS FOR PHONE SURVEYS

3. Set up a strict protocol for refusals: likelihood of refusals is higher
    - We ask an SFO to always follow up on every refusal

4. Clear productivity targets at start of survey, actively track each FO

5. HFCs include:
    i.   monitoring section wise time stamps across enumerators
    ii. consistency checks - link roster to other parts of survey
    iii. timings of when the calls are being made from phone logs

TIPS FOR PHONE SURVEYS

6. Create a strict protocol on how to work with several languages
    - All FOs know who speaks what, SFOs ready to reassign FOs quickly

7. Protocol for sensitive questions/participant wariness (happens more)
    - FO hands the phone to their SFO to explain IPA/JPAL confidentiality policy, the project and why participation is important

8. Collect as many phone numbers as possible, including their family

9. We do not use text to inform people we will call – not successful

PHONE SURVEYS DURING COVID

All calls made from home by enumerators

Need stronger monitoring of the surveys since the enumerators are not in the office and cannot be watched

If you are switching from in person to a phone survey, the instrument needs to be shortened dramatically

ADDITIONAL MONITORING

1. Increase the frequency of back-checks and HFCs
   - We are doing 100% back checks (saving money by going from in person to phone and trying to pay the full team till contract end)
   - Added a few extra questions to the endline on things that don't change over time – additional consistency checks
   - Match call length from phone call logs to length from survey CTO

2. Survey CTO has audio audits (tape enumerator side of survey)
   - You will need IRB for this (a standard line we will add to all IRBs now)

ADDITIONAL MONITORING

3. FM spends at least 50% of their time looking through the data daily
   - Data RA in the US to look at it daily as well

4. SFOs call each FO daily: go through questions, go over tracking sheets

5. Whatsapp group for all staff including the RA

6. RM/RA writes an email twice a week (Mon & Thurs): are we meeting targets? are we following protocols?
   - Usually we do this with the teams in person, transfer these to email

SHORTENING THE SURVEY

1. List a set of maximum 10 outcomes that you care about most (if you have a PAP this may be easier): be brutal

2. Trace each of these outcomes to what you need to measure to compute it, e.g. consumption is the outcome, each item in the consumption module is an input

3. Trace these inputs back to the questions you used to measure them in your original in person endline

SHORTENING THE SURVEY

4. Aggregate, aggregate, aggregate

    Example 1: consumption module

    In person endline: 961 questions/cells (275 different items)

    Phone endline: 8 aggregated questions (food x2, rent+, personal care, education x2, health, durables)

    Example 2: agriculture module

    In person endline: plot level and crop level modules, detailed labor, livestock

    Phone endline: 22 questions (total harvest, sales, inputs, labor by person, assets – all separately for ag and livestock)

5. This can take a few weeks, happy to share all our aggregations

NEED MORE?

Huge thank you to the UBI team: Tessie Lezcano, Deborah Muthoki, Eunice Kioko, Catherine Gakii, Mansa Saxena and Shreya Chandra

Please contact any of them or me if you want to talk through what you are thinking of doing

Happy to share all protocols, surveys, survey CTO code, etc.

THANK YOU