Piloting

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Outline of Presentation

- Importance of Piloting
- Steps in Piloting
- Implementing the Pilot
- Things to look for in a Pilot
- Discussion of questions with respondents
- Importance of language and translation
- Documentation and feedback
Piloting

- Questionnaire is finalized – so what’s next?

- Piloting
  - Trial run of questionnaire
  - Practice asking questions
Importance of piloting

Piloting and testing is extensively used in other domains:

- Companies test ideas on consumers using rough-and-ready prototypes
  - Amazon tests versions of websites
  - Google Beta

- Chris Rock, one of America’s most famous comedians, tests his ideas often in small venues first (The Economist, April 2011)
Importance of piloting

- Finding the best way to procure required information
  - choice of respondent
  - type and wording of questions
  - order of sections

- Piloting and fine-tuning different response options and components

- Understanding of time taken, respondent fatigue and other constraints
Steps in Piloting

ALWAYS allow time for piloting and back-and-forth between team on the field and the researchers

Two phases of piloting

Phase 1: Early stages of questionnaire development
- Understand the purpose of the questionnaire
- test and develop new questions
- adapt questions to context
- build options and skips
- Re-work, share and re-test
- Build familiarity, adapt local terms, get a sense of time
Steps in Piloting

Phase 2: Field testing just before surveying

- Final touches to translation
- Questions and instructions
- Keep it as close to final survey as possible.
Implementation of the Pilot

- Find a population similar to the people in the study, but won’t be a part of the study. Example: village/slum close to sample village/slum

- If respondent type known, then test on same, otherwise pilot to determine best respondent

Protocol

- Lots of new questions/ new context – pilot at least 30-40 times
- Recycling old questions - at least 15-20 times
- Pilot as often as you add new questions
- Engage the respondents so that they can discuss the questions
- If others are piloting your tool, ensure that they do not make their own assumptions about questions
Things to look for during the pilot

- Comprehension of questions
- Ordering of questions - priming
- Variation in responses
- Missing answers
- More questions for clarifications? Cut questions? consistency checks?
- Is the choice of respondent appropriate?
- Respondent fatigue or discomfort
- Need to add or correct filters? Need to add clear surveyor instructions?
- Is the format (phone or paper) user-friendly? Does it need to be improved?
Discuss potentially difficult questions with the respondent

Example 1: Simplify/clarify questions
Do you use Student Evaluation Sheets in your school?

a. Yes  
b. No  
c. Don’t know/Not sure 
d. No response

- They might not know it by this name (show them a sample)
- You may need to break it up into several questions to get at what you want
  - Do you have them?
  - Do you know how to use them?
  - Do you use them?
Discuss potentially difficult questions with the respondent

Example 2: Adding options

What are the items you purchase weekly for use in the school MDM program?

a. Rice
b. Wheat
c. Vegetables
d. Fruits
e. Oil
f. Others

During the pilot a lot of respondents said “salt” and we included it as an option explicitly.
Discuss potentially difficult questions with the respondent

Example 3: Ordering questions and priming

1) Yesterday, how much time did you spend cooking, cleaning, playing with your child, teaching/doing homework with your child?
2) Do you think its important for mothers to play with children?
3) Do you think mothers or fathers should be more responsible for a child’s education?

If Questions 2 and 3 had come before 1, there could’ve been a possible bias, order and wording of questions is important
Discuss potentially difficult questions with the respondent

Example 4: Respondent discomfort

Example: “Do you experience discomfort during menstruation?” to an adolescent girl student

Suggestions:

- Ensure privacy during survey
- Ensure appropriate kind/gender of surveyor
- Add surveyor instructions to read out and explain a prepared excerpt before these questions
- Soothe respondent
Importance of Language and Translation

- The local language is probably not English, which makes things tricky as to the wording of certain questions
  - But people be familiar with “official” words in English rather than the local language

- Translate
  - Ensures that every surveyor knows the exact wording of the questions, instead of having to translate on the fly

- Back-translate
  - Helps clarify when local-language words are used that don’t have the same meaning as the original English
Documentation and Feedback

- Notes – time, difficulties, required or suggested changes
- Meetings to share inputs
- Draft document
- Keep different versions of the questionnaire
THANK YOU!

Questions?