CHAPTER 4
Training Manual

This training manual is used to train the entire survey team. As the trainer, you should familiarize yourself with all contents of the training manual. The training agenda provides estimated times to complete the 15 modules in the training manual. Each module specifies participants, estimated time needed to complete the module, goals of the module, a list of training handouts (Appendix C), and in-class activities.

The training manual provides guidance and suggestions for training, but as the trainer, you may need to make modifications based on your specific situation. Space is provided in the manual for taking notes, such as plans for customizing the module or a list of items that are missing. Some training modules cover the use of forms; the actual forms needed in order to conduct the survey are included in the appendices.

The suggested time needed to accomplish each module, listed in the training agenda, is only an estimate. The actual number of training hours required will vary depending on factors such as the number of people in training and how quickly they master the skills. The number of days required to accomplish the training will depend on factors such as how many hours per day people can concentrate on learning new things, the amount of time taken for breaks and meals, and the time of day when the pilot test will be most efficient, according to when it is likely that eligible women will be available for interviews The estimated overall time needed for training will be approximately 10 days for the supervisors and interview team(s), 3 days for the locator team(s), and 1/2 day for the data entry staff.

IMPORTANT: Because of the sensitive nature of the questions and the difficulty in obtaining privacy at a participant's home, it is strongly recommended that your teams conduct interviews at a central location (outside the participant's home), where the questionnaire can be administered in a private area. If it is not possible to conduct the interviews in a central location, interviewers will need to try to find a private area in the house to conduct the interview and ask the other household or family members to respect the participant's privacy. It may be necessary to pause several times throughout the interview to ensure the privacy of the participant's responses.

Training the Survey Team

The goal of this training is to provide information, examples, and practice opportunities to the survey team so that they can do their jobs well. The team will need sufficient time to practice to ensure that they collect quality information. Adjustments should be made during training if needed to ensure that every member of the team can perfectly understand the questionnaire and survey procedures.

The survey requires a field team of interviewers, locators who are responsible for selecting women at the household and sending them to the interview location, and team supervisors. Although interviewers, locators, and supervisors have different tasks during the survey process, all are responsible for protecting the rights and privacy of the participants. All field team trainees should be together during the training sessions covering Modules 1-3 so that everyone has a clear understanding of the overall purpose of the survey and their respective roles and responsibilities. Interviewers and supervisors will then continue on with the training together, while locators can split into a separate training group to learn their specific tasks.

The data entry staff will be responsible for timely and accurate entry of the questionnaires as they are completed and returned from the field. The training for data entry staff should take place after the field team training is completed. The questionnaires collected from the practice interviews and pilot testing can then be used for data entry training.

Re-assigning trainees

You may find in the course of the training that some trainees are not able to develop the skills needed to adequately conduct the survey. In this case, it is important that you re-assign or release them and not risk compromising the quality of data collection. To allow for this possibility, we recommend that you train a few more people than you will ultimately need. It should be made clear from the first day of training that trainees are required to demonstrate a certain level of competency in order to be hired. If possible, offer a different task or project when trainees fail to meet competency requirements.

Preparation for training

Chapter 2, Planning Checklist, has been provided to help you organize the administrative details needed before training and data collection begins. You may need to modify the list according to your specific situation. There is also a table outlining the criteria and responsibilities of each member of the survey team which may be helpful to you as you hire your survey team. In addition, Chapter 3, Sampling Instructions, will help determine which sampling method is best for your situation. Finally, you will need to develop and distribute to team members a resource list containing contact information for local referral services available to survey participants.

TRAINING AGENDA

Below are estimated times to complete each training module. These estimates are based on pilot-testing of the Toolkit and assume an 8-hour work day. As the trainer, you may need to adjust the estimates to fit your specific situation.

SURVEY TEAM:	Estimated Time to Accomplish

Module 1: Administrative Arrangements . . . . 2 hours

- Introductions
- Administrative details
- Identify questions to be answered during the training

Module 2: Introduction to the Survey . . . . 2 hours

- Introduction to the survey and its purpose
- Issues of reproductive health covered in survey
- Reproductive health terminology

Module 3: Defining the Roles and Responsibilities of Survey Team . . . . 3 hours

- Responsibilities of each team member
- Rights of participants and confidentiality
- Safety and emergency procedures

Module 4: Understanding the Survey and Survey Questions . . . . 24 hours

- Questionnaire administration process description
- Question-by-question explanation and discussion

Module 5: Interviewing Techniques and Initiating the Interview . . . . 4 hours

- Guiding principles for interviewers
- Tips for good interviewing
- Practice through role-playing

Module 6: Practice Interviews with Role Playing . . . . 36 hours

- Practice interviewing
- Practice recording responses

Module 7: Locator Training—Overview of Process. . . . . 2 hours

- Administrative details
- Review of Locator Form
- Identify questions to be answered during training

Module 8: Locator Training—Use of Forms. . . . . 5 hours

- Review of Locator Form in detail
- Practice in filling out each section of the form

SURVEY TEAM:	Estimated Time to Accomplish

Module 9: Locator Training— Role Playing. . . . . 8 hours

- Practice in introductions at households
- Practice in random selection of woman
- Practice in obtaining consent
- Practice in filling out visit record box

Module 10: Supervisor Training— Household Selection Process . . . . 8 hours

- Familiarization with sampling method to be used (random or cluster)
- Training on how to identify households for survey
- Training on how to review questionnaires for logic and completeness

Module 11: Practice Interviews in the Community . . . . 8 hours

- Provides interviewers, supervisors, and locators real-life experience in administering the survey

Module 12: Review of Survey Schedule . . . . 3 hours

- Review logistics of how the interview teams will conduct the survey

DATA ENTRY:	Estimated Time to Accomplish

Module 13: Data Entry—Administrative Arrangements .0.5 hours

- Review administrative and logistical details
- Explanation of roles and responsibilities of each team member
- Review confidentiality procedures

Module 14: Data Entry Instructions . . . . 3 hours

- Overview of survey
- CSPro data entry program and instructions
- Reinforce importance of data quality issues
- Practice in entering questionnaires

Module 15: Data Entry and Cleaning (supervisors only) . . . . 1 hour

- Resolving questionnaire errors or data entry errors
- Checking the quality of data being entered
- Combining datasets
- Producing a clean dataset

Total training hours for supervisors: . . . . 109.5 hours

(Note: It will be necessary to have some supervisors participate in the locator training and data entry training as they will be the locators and data entry staff supervisors.)

Total training hours for interviewers: . . . . .82 hours

Total training hours for locators: . . . . .33 hours

Total training hours for data entry staff: . . . . .3.5 hours

MODULE 1:
Administrative Arrangements

Participants:

Interviewers, locators, and supervisors

Estimate of time needed:

At least 2 hours are needed to complete this module.

Goals of this module:

- Help trainers and trainees get to know each other
- Address immediate questions trainees may have
- Identify questions to be answered during the training

Handouts for this module:

- Handout 1: Sample Training Schedule (to be modified by trainer)
- Handout 2: Sample Logistics Administration (to be modified by trainer)

In class:

As the trainer, begin by introducing yourself and ask the trainees to state their names and briefly describe themselves. Request that the trainees create nametags or write their name on a folded sheet of paper placed in front of them.

Discuss working arrangements for the survey, including:

- Salary and per diem
- Working hours
- Training schedule, including time for breaks
- Survey schedule
- Transportation and other logistical issues

Training schedules (Handout 1) and logistical details (Handout 2) should be developed in advance and given to the trainees on the first day. In addition, rules regarding absenteeism should be established and discussed with the trainees. Both the training and survey data collection are labor intensive. It is important that an appropriate schedule is established to ensure that work can be done in the most efficient manner possible. You may choose to have a 5-day or 5 ½ - day work week in accordance with what is typical in your location. We recommend that team members do not exceed this amount due to the intensive nature of the work. Team members will also need some time off to relax each week. As for the training sessions, it is important to include several breaks, normally lunch and a morning and afternoon break, in order to give everyone a rest and a chance to socialize and get to know each other. Other logistical considerations may also influence the schedule. For example, team members may need time to take transportation to reach the training or interview location.

Trainees will likely ask you questions about the survey that you intend to answer during upcoming training sessions. Acknowledge the relevancy of the questions but do not try to answer them at this time. Instead, write down all of these questions and explain that they will be addressed during another training session. At the end of the training, revisit the questions to make sure that all have been answered.

We recommend delaying the announcement of personnel assignments to survey teams (as interviewers, locators, and supervisors) until the end of training, when you will know better each person's strengths and weaknesses and how different people work together.

Trainer notes:

MODULE 2:
Introduction to the Survey

Participants:

Interviewers, locators, and supervisors

Estimate of time needed:

At least 2 hours are needed to complete this module.

Goals of this module:

- Introduce the survey and discuss its purpose
- Familiarize survey team with reproductive health issues covered in survey
- Review reproductive health terms

Handouts for this module:

- Handout 3: Overview of the Survey
- Handout 4: Reproductive Health Terms

In class:

Using Handout 3, go over the main goals of the survey, what your organization hopes to accomplish with the information obtained through the survey, and the main topic areas covered in the questionnaire. Make sure that trainees understand the reproductive health terms covered in Handout 4.

Trainer notes:

MODULE 3:
Defining the Roles and Responsibilties of the Survey Team

Participants:

Interviewers, locators, and supervisors

Estimate of time needed:

At least 3 hours are needed to complete this module.

Goals of this module:

- Explain responsibilities of each team member
- Explain rights of participants and confidentiality
- Explain possible emergency situations
- Understand how to complete the Incident Report

Handouts for this module:

- Handout 5: Roles and Responsibilities of Team Members
- Handout 6: Research Participant's Rights and Confidentiality
- Handout 7: Safety and Emergency Procedures
- Handout 8: Incident Report

In class:

Using Handout 5, discuss and review the roles and responsibilities of each team member. Using Handout 6, review the rights of research participants and confidentiality issues. Review the guidelines all team members must follow. You must make sure that confidentiality issues are well explained, given the sensitive nature of the topics covered in the survey. Using Handout 7, make sure survey staff are aware of possible emergency situations and review safety and emergency procedures. Review the Incident Report (Handout 8) and make sure everyone understands the procedures to follow should a problem arise.

Trainer notes:

MODULE 4:
Understanding the Survey and Survey Questions

Participants:

Interviewers and supervisors

Estimate of time needed:

Approximately 3 days are needed to complete this module.

Goals of this module:

- Describe the questionnaire administration process
- Explain and discuss the questionnaire, question-by-question

Handouts for this module:

- Handout 9: Filling Out the Questionnaire
- Appendix G: Copies of the questionnaire
- For the trainer: Appendix D: Questionnaire Guide–Question by Question

In class:

Using Handout 9, go over all questions in the questionnaire, making sure that everyone understands the terminology, language, and concepts. You may want to take advantage of the local expertise of the team to make any needed adjustments to the local language translations of the questionnaire. In addition, review the questionnaire using the Questionnaire Guide (Appendix D).

Trainer notes:

MODULE 5: Interviewing Techniques and Initiating the Interview

Participants:

Interviewers and supervisors

Estimate of time needed:

At least 4 hours are needed to complete this module.

Goals of this module:

- Review the guiding principles that interviewers should follow
- Review keys for good interviewing
- Practice interviewing through role playing

Handouts for this module:

- Handout 10: Guiding Principles for Interviewers
- Handout 11: Keys to Successful Interviewing
- For the trainer: Appendix E: Practice Exercises

In class:

Use Handout 10 to review the guiding principles for interviewers. Use Handout 11 to review the keys to successful interviewing. Then practice Exercises 1 and 2 (Appendix E).

Trainer notes:

MODULE 6:
Practice Interviews with Role Playing

Participants:

Interviewers and supervisors

Estimate of time needed:

At least 4½ days are needed to complete this module.

Goals of this module:

- Practice interviewing
- Practice recording responses

Handouts for this module:

- Appendix G: Copies of the questionnaire
- For the trainer: Appendix E: Practice Exercises

In class:

Do practice exercises 3-5 (Appendix E). Have the interviewers role-play in pairs before the class and have the others comment on what went well and what can be improved upon. Make sure the class discusses various scenarios and issues that may arise and discusses approaches that may help facilitate the process.

Trainer notes:

MODULE 7:
Locator Training—Overview of Process

Participants:

Locators and supervisors

Estimate of time needed:

At least 2 hours are needed to complete this module.

Goals of this module:

- Discuss administrative details
- Review Locator Form
- Identify questions to be answered during training

Handouts for this module:

- Appendix F: Locator and Consent Form

In class:

Explain to the locators that they will be responsible for going to houses selected for the study and recruiting study participants. They will also be responsible for obtaining consent from the participants who agree to take part in the study.

Discuss the logistical arrangements for their role and write down any outstanding questions participants have that need be addressed during training.

Hand out copies of the Locator and Consent Form. Perform a general review of the form, making sure that everyone understands the terminology and concepts covered, especially in the consent section.

Trainer notes:

MODULE 8:
Locator Training—Use of Forms

Participants:

Locators and supervisors

Estimate of time needed:

At least 5 hours are needed to complete this module.

Goals of this module:

- Review the Locator Form in detail
- Practice filling out each section of the form

Handouts for this module:

- Appendix F: Locator and Consent Form

In class:

The locators will be given locator forms which include consent information and the visit record. Explain to the locators how to fill out the information according to the guidelines below.

Overview:

Locator Name	Locator enters his/her name.
Camp Number	These can be pre-entered by the locator supervisor
Locator Form Number (range 0-9)	This number will be used for randomly selecting a participant within each household. The Supervisor will fill this in before data collection begins. S/he will enter 0,1,2,3, etc over and over until all the forms have a number. See instructions on how to use this number for random selection of participants within households.
Questionnaire Number	The supervisor will enter the corresponding questionnaire number at the time of the interview. This will allow the locator form to be linked to the questionnaire.
Supervisor	Supervisor will fill in his/her name.

For the locators:

- When the locator approaches a home, s/he reads word for word the introduction and purpose of the study to the adult male or female who comes to the door. The locator should be well practiced giving general information about the survey and should be able to answer questions confidently.
- Next, the locator asks how many women between the ages of 15 and 49 (referred to in this manual as women of reproductive age or “WRA”) live in the household and writes down the number on the form.
- If there are no women who are between the ages of 15 and 49 years, then the locator should thank the person and SKIP to the “Visit Record” and complete that section.
- If at least one eligible woman lives in the house, then the locator asks for the age of each woman living in the house who is between 15 and 49 years of age (starting with the oldest woman and ending with the youngest). The locator should read this out loud as s/he is filling the WRA table to verify that the information is correct (see Box 1).

Box 1: Table of eligible women in household

In this example, there are three women between the ages of 15-49 in the households, recorded from oldest to youngest.

WRA Line	AGE (Complete years)
1	45
2	30
3	21
4	
5	
6	
7	
8	

- After entering the ages of all eligible women (i.e., all women between the ages of 15-49 years), the locator should randomly select one woman in the household for the interview using these steps and the selection table (see Box 2).
  - a) Reading down the column titled "The Locator Form Number" find the number that corresponds to the number recorded on top of the Locator Form and circle it. In this example, the locator form number is 2.
  - b) Then find the number of eligible women recorded in the WRA table from the row where the numbers run from 1-8 under the heading "Number of WRA in the House." In this example, there are 3 eligible women from the example in Box 1, so you circle "3".
  - c) Follow the locator number line across and the WRA number down until you reach the number where the two rows intersect. In this example, they intersect at "1" so the woman listed in Line 1 of the WRA table you have filled out, who is 45 years old, will be selected as the respondent from the household.
  - d) Fill out the appropriate numbers in the box below the table. In this example, the WRA on line 1 of your WRA table was chosen, and the total number of WRA in the household is 3.

Box 2: Example of randome selection of WRA to be interviewed

The Locator Form Number	Number of WRA in the House							
	1	2	3	4	5	6	7	8
0	1	2	2	4	3	6	5	4
1	1	1	3	1	4	1	6	5
2	1	2	1	2	5	2	7	6
3	1	1	2	3	1	3	1	7
4	1	2	3	4	2	4	2	8
5	1	1	1	1	3	5	3	1
6	1	2	2	2	4	6	4	2
7	1	1	3	3	5	1	5	3
8	1	2	1	4	1	2	6	4
9	1	1	2	1	2	3	7	5

1. Line Number of the Chosen WRA 1
2. Total Number of WRA in the Household 3

If the chosen woman is at home:

- The locator will read the consent form to her word for word.
- If the woman agrees to the interview, then the locator should sign that section. For reasons of confidentiality, the woman should not sign the consent form nor should her name appear anywhere on the locator form. The locator should complete the visit record and use the result code of "1" that the woman agrees to the interview.
- The locator should then either direct the woman to the interview location or make an appointment time for the woman to participate. The locator should return the locator form to the supervisor at the time of the interview, either in person or sent with the participant, to ensure that the supervisor can keep the consent form with the questionnaire.
- If the selected woman refuses to participate in the survey, the locator will read the question asking why the woman does not want to participate (see Box 3), circle the corresponding response given by the woman, thank her for her time, complete the visit record, and give the completed locator form back to her supervisor.

Box 3: Refusal

If respondent refuses, read the following, circle the appropriate response and then continue:

I'm sorry you will not be able to participate in this survey. May I ask you why you do not want to participate in the survey?

1. No time/busy
2. Not interested
3. Information too sensitive
4. Other (specify) ___________________
5. No reason given/don't know

Thank you very much for your time. ------------------------END

If the chosen woman is not at home:

The locator will ask when she will be back, complete the visit record and make arrangements to return to speak with her later. A total of 7 attempts to speak with the selected woman should be made.

How to complete the visit record

- The locator should complete the visit record appropriately and use the result codes listed below the visit record box to indicate the result. Box 4 provides an example of how to complete the visit record.
- Conduct up to 7 attempts to locate the selected woman. If after 7 attempts, the locator is unable to speak to the selected woman, the locator will complete the visit record and give it back to her supervisor.

Box 4: Example of completing the visit record

In this example , the locator has selected a woman, but she is not home. The locator returns the next day, and the selected woman is home and agrees to be interviewed. The following is how the Visit Record should be completed.

Visit number	1		2		3		4		5		6		7	
Locator # ______ ______														
Date of visit	Day	05	Day	06	Day		Day		Day		Day		Day	
	Month	11	Month	11	Month		Month		Month		Month		Month	
Result*	4		1											

*Result codes

1. Agree to interview
2. No eligible woman (age 15-49)
3. Nobody home
4. Selected respondent not home
5. Selected respondent refusal
6. Unoccupied house
7. Other (specify)____________

Trainer notes:

MODULE 9:
Locator Training—Role Playing

Participants:

Locators and supervisors

Estimate of time needed:

At least 1 day is needed to complete this module.

Goals of this module:

- Practice introduction at household
- Practice random selection of woman from household
- Practice obtaining consent
- Practice filling out visit record box

Handouts for this module:

- Appendix F: Locator and Consent Form

In class:

As with the interviewer trainees, have the locators role-play in pairs before the class and have the others comment on what went well and what can be improved upon. Make sure the class discusses various scenarios and issues that may arise and discusses approaches that may help facilitate the process.

Trainer notes:

MODULE 10:
Supervisor Training

Participants:

Supervisors

Estimate of time needed:

At least 1 day is needed to complete this module.

Goals of this module:

- Familiarize supervisors with sampling method to be used (random or cluster)
- Train supervisors on how to identify households for survey
- Train supervisors on how to review questionnaires for logic and completeness

Handouts for this module:

- Chapter 3, Sampling Instructions

In class:

Supervisors may be selected from the interviewer and locator groups or may be the trainers themselves. A qualified supervisor is a good interviewer who is very familiar with the survey and is knowledgeable about the survey area and its culture and politics. Supervisors should have gone through the entire training. If they will be supervising the interview team(s), they should have experience correcting questionnaires. They must be able to review the completed questionnaire quickly so that they do not delay the respondents unnecessarily and to keep up a good pace for the interviews. Both locator and interviewer supervisors will be expected to be with their teams every day of data collection to ensure data quality and help problem-solve any logistical issues that come up.

Review the relevant sampling instructions (random or cluster) and ensure supervisors understand the selection process, as they will be guiding their teams in household selection.

Supervisor responsibilities:

- Ensure the correct selection of households to be sampled.
- Coordinate the locators so that the flow of participants allows for the greatest number of interviews.
- Collect the completed locator forms at the time of the interview and staple it to the corresponding questionnaire.
- Review the questionnaire before the participant leaves the interview location to ensure for correct logic (e.g., skip patterns) and complete information.
- Deal with any logistical issues that arise.

Trainer notes:

MODULE 11:
Practice Interviews in the Community

Participants:

Interviewers, locators, and supervisors

Estimate of time needed:

Approximately 1 day to complete this module.

Goals of this module:

- Provide interviewers, supervisors, and locators real-life experience in administering the survey
- Practice survey/data collection logistics

Handouts for this module:

- Appendix F: Locator and Consent Form
- Appendix G: Copies of the questionnaire

In class:

This is the most crucial part of the training. It should serve as the final determination to see who is fully capable of conducting an interview or acting as a locator. It will also help to identify any issues or translation problems that might not have arisen during the training.

The practice interviews should take place in a community where you will not be conducting the real survey. If necessary, obtain permission from authorities to conduct interviews in the area. These interviews will not be included in the analysis. However, these interviews will be used for data entry training.

Divide the supervisors and interviewers into teams that will practice interviews. Direct each team to a different area so that they will not disturb one another or cause unnecessary confusion in the community. Coordinate the locator supervisor and locators so they know which houses they must visit in order to recruit participants for the practice interviews.

Each interviewer should conduct 2-3 interviews. Supervisors should review the questionnaires when the interview is complete. The supervisors should closely observe several of the interviewers as they conduct an interview and provide feedback once the interview is over. Make sure these discussions do not take place in front of the participant. The locator supervisor should observe the locators to make sure they complete the locator form correctly, select the WRA appropriately according to the WRA and selection tables, and obtain consent for the interview.

Time should be allotted during the following work day to discuss the experience as a group and to address issues that came up, including any changes to the questionnaire that might be needed.

Trainer notes:

MODULE 12:
Review of Survey Schedule

Participants:

Interviewers, locators, and supervisors

Estimate of time needed:

At least 3 hours are needed to complete this module.

Goal of this module:

- Review logistics of how the interview teams will conduct the survey.

Handouts for this module:

- Survey schedule and assignments

In class:

Announce assignments to the survey teams. Give each interviewer, locator, and supervisor a schedule of where the teams will be throughout the survey. Let them know when and where to report for duty. Remember that interviewers will need time to discuss any problems they anticipate, such as transportation, security, or overnight stays.

Check to see that all questions have been answered. Before you dismiss the teams, stress the importance of the work to be done and your confidence in their ability to do a good job.

Trainer notes:

MODULE 13:
Data Entry—Administrative Arrangements

Participants:

Data entry staff and supervisors

Estimate of time needed:

At least 30 minutes are needed to complete this module.

Goals of this module:

- Review administrative and logistical details
- Explain roles and responsibilities of each member of the team
- Review confidentiality procedures

Handouts for this module:

- Handout 12: Data Entry Staff Guidelines

In class:

Introduce yourself and ask trainees to state their names and briefly describe themselves. Request that the trainees create name tags or write their name on a folded sheet of paper placed in front of them.

Review the guidelines for team members. Though the questionnaires will not have any identifying information (only a unique questionnaire identification number), it is important to review issues of confidentiality, given the sensitive nature of many of the topics covered in the survey. Address working arrangements for the survey. We suggest you discuss:

- Salary
- Working hours
- Transportation and other logistical issues, if necessary

Schedules and logistical details should be developed and given to the data entry staff on the first day. In addition, rules regarding absenteeism should be established and discussed with the trainees. Before training begins, determine whether data entry staff will be paid per day or per questionnaire. Paying by questionnaire is generally preferred as it encourages work to be completed in a timely manner; however, it is important to ensure that the data entry is not done too quickly, such that accuracy is sacrificed. Double entry of all records is recommended, to check for accuracy, but a subset of questionnaires (10%) is acceptable.

Establish a data entry schedule to ensure that work can be done in the most efficient manner possible. Staff should be made aware of how many questionnaires they are expected to enter each day and how long the process should take. The length of the questionnaire, the accuracy of the editing, and the skills of the data entry staff will influence how many questionnaires can be entered each day. The schedule may be adjusted as the data entry staff become more experienced with the job or as problems arise; however, it is often useful to develop a structure at the outset (with some flexibility built in) so that people know what is expected of them and in what timeframe. Other logistical considerations may also influence the schedule. For example, team members may need to take transportation to reach the training or data entry location.

Trainer notes:

MODULE 14:
Data Entry Instructions

Participants:

Data entry staff and supervisors

Estimate of time needed:

At least 3 hours are needed to complete this module.

Goals of this module:

- Provide overview of survey
- Review data entry program and instructions
- Reinforce data quality issues
- Practice entering questionnaires

Handouts for this module:

- Handout 3: Overview of Survey
- Handout 13: Data Entry Instructions

In class:

Using Handout 3, provide an overview of the main goals of the survey, what the organization hopes to accomplish with the information obtained through the survey, and the main topic areas covered in the questionnaire.

Using Handout 13, review the data entry instructions. Instruct the data entry staff on where to save their data files, how to enter questionnaires into CSPro, and important considerations to keep in mind when entering data. For practice, use questionnaires collected during the practice interviews. It is important to walk data entry staff through the entry process on the computer. Show the trainees how to enter one questionnaire and then allow them to practice with a few questionnaires. Answer questions as they arise.

Remind the data entry staff that it is not their responsibility to guess what a response might be or to make decisions as to how to enter incorrectly filled out questionnaires. There should always be a supervisor available to answer questions. Each staff member will be assigned a unique two digit code. This code is entered in Q009 on the front page of the questionnaire, and it will help identify who entered the questionnaire, in case consistent errors are being noticed.

After practicing, check to see if trainees have additional questions. Give them information on when and where to report for duty. Before dismissing the trainees, stress the importance of the work to be done and your confidence in their ability to do a good job.

Trainer notes:

MODULE 15:
Data Entry and Cleaning (Supervisors Only)

Participants:

Supervisors

Estimate of time needed:

At least 1 hour is needed to complete this module.

Goals of this module:

- Understand how to resolve questionnaire errors or data entry errors
- Know how to check the quality of data being entered
- Learn how to combine datasets
- Learn how to produce a clean dataset

Handouts for this module:

- Handout 14: Concatenating Data
- Handout 15: Data Cleaning

In class:

Have participants read the following to themselves and be prepared to answer any questions:

Supervisors will already have been selected during survey collection. The supervisor for data entry may be selected from that group. The selected data entry supervisor should undergo the data entry training and should also be very familiar with the survey and knowledgeable about computers. Supervisors should be able to resolve any questionnaire errors or data entry errors.

Supervisors must also check the quality of data being entered. At the beginning of the data entry process, the supervisor will need to review each data entry staff member's work to make sure he or she understands the data entry instructions. Once data entry staff become more experienced, the supervisor should check data quality on a periodic basis.

Data quality may be checked using CSPro VERIFY mode. You will need to decide whether data entry staff or supervisors will verify the questionnaires. The verification process will help to minimize data entry errors but will require additional staff time. It is recommended to verify all files, but verifying only a randomly selected sample (for example, 10%), based on questionnaire numbers is acceptable.

During the data collection period, supervisors should carefully check completed questionnaires for errors. In the case that an error is found during data entry, data entry supervisors should correct or clarify data and document the correction on the questionnaire. In the case that there is an unclear response on the questionnaire or other problem, the data entry supervisor should be the only one to make a judgment call on how to correct or clarify the data. Data entry staff should never make the call in such cases. Data entry supervisors should seek to apply decisions consistently.

If there are multiple data files, supervisors are responsible for concatenating (combining) them into a single data file (Handout 14). Supervisors are also responsible for cleaning the dataset (Handout 15). The supervisor will also be responsible for ensuring that completed questionnaires are stored in a secure location.

Trainer notes: