ActivityInfo

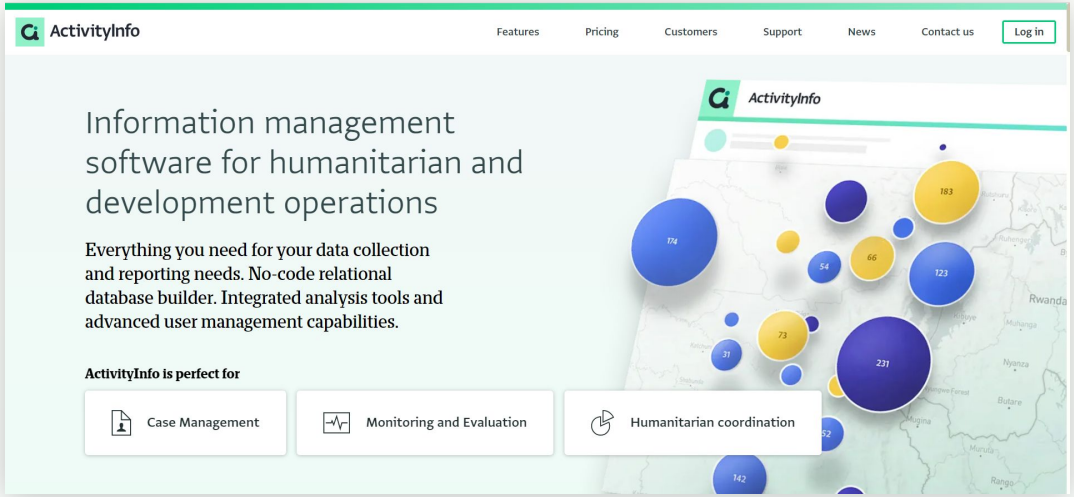
Survey implementation

Starting shortly, Please wait!

Presented by the ActivityInfo Team

All in one information management software for humanitarian and development operations

- Track activities, outcomes
- Beneficiary management
- Surveys
- Work offline/online



The Webinar Series

Survey Design for quantitative data collection

Survey Implementation

Survey Design and Implementation: Real life examples

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Outline

01 Preparing to implement M&E surveys

02 Implementing M&E surveys

03 Additional topics

04 Q/A session

Preparing to implement M&E surveys

Preparing to implement M&E surveys

Resourcing and Logistics before survey deployment

Team Formation	• Assemble a competent team for Survey design, data collection, analysis, reporting • Clarify roles and responsibilities
Determine the budget	• Personnel, transportation, communication, equipment, data management, etc.
Develop a realistic timeline	• For planning, training, fieldwork, data analysis, reporting • Include key milestones
Pilot test tools	• Identify issues, revise as needed • Select ICT4D tools
Comprehensive training for survey team	• Survey methodologies,data collection techniques,ethical considerations, safety protocols and survey tool usage
Sampling Strategy	• Consider population demographics, geographical spread, sample size

Preparing to implement M&E surveys

Resourcing and Logistics before survey deployment

Risk Management	• Identify potential risks and challenges: a. Security concerns b. Adverse weather conditions c. Logistical constraints • Develop contingency plans
Communication Plan	• Establish clear communication channels: ○ Within survey team ○ With stakeholders
Logistical Arrangements	• Support for survey team: ○ Transportation ○ Accommodation ○ Meals during fieldwork • Necessary equipment and supplies: Vehicles, GPS devices, smartphones/tablets, stationery, etc

Preparing to implement M&E surveys

Sampling Types

- Systematic Random Sampling
- Stratified Random Sampling
- Cluster Random Sampling
- Multistage Random Sampling
- Non-Random Sampling Techniques

- Purposeful Sampling
- Snowball Sampling
- Quota Sampling
- Convenience Sampling

Preparing to implement M&E surveys

Sampling Characteristics

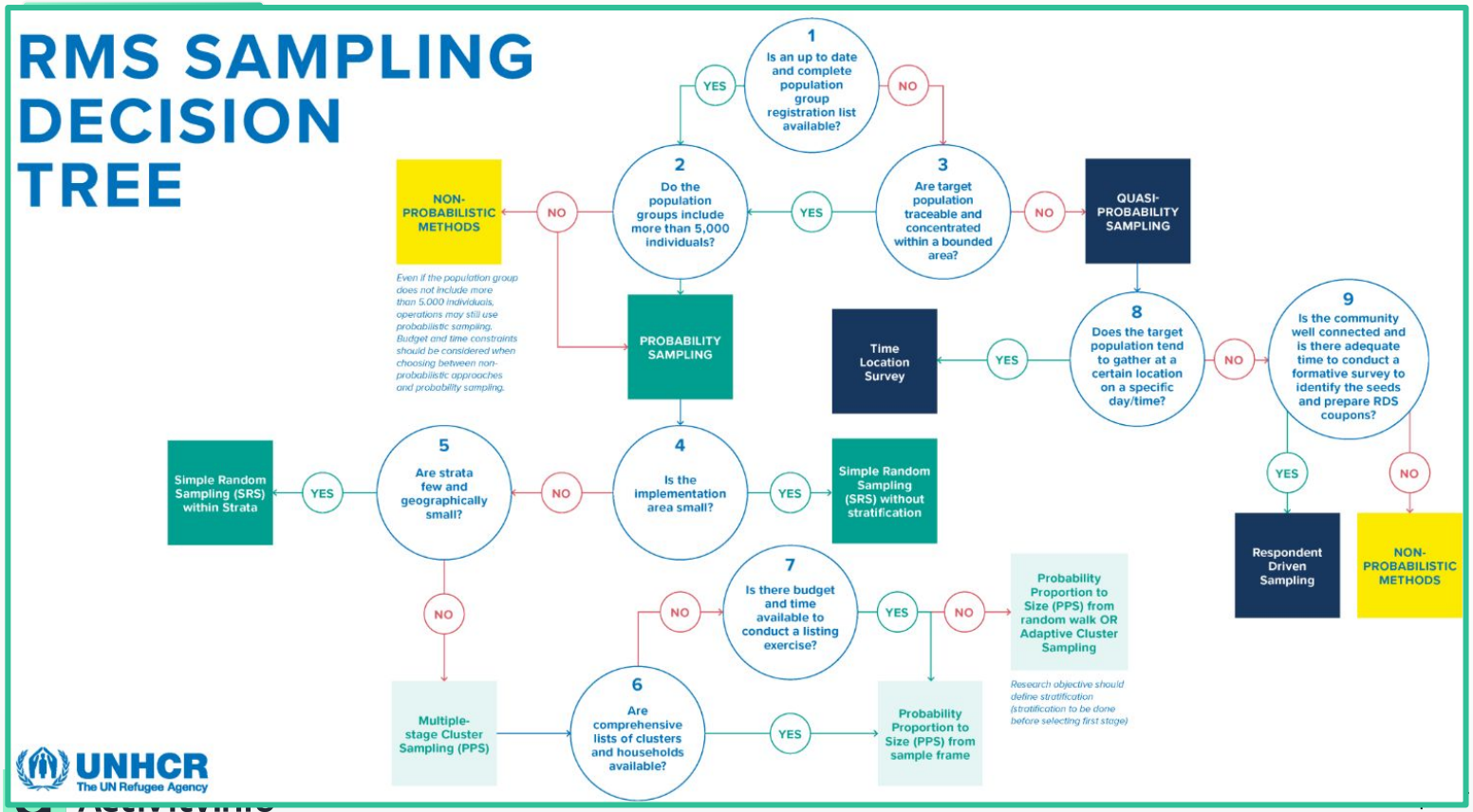
- Random Probability Design
- Full Geographical Coverage
- Controlled Non-Coverage
- Stratification
- Probability Proportional-to-Size (PPS) Selection
- Randomized or Deterministic Selection

Preparing to implement M&E surveys

Sample representativity: Factors to consider

- Rarity of the Event
- Response Rate
- Precision of Estimates / Desired Margin of Error
- Available Resources

Preparing to implement M&E surveys



Preparing to implement M&E surveys

Training before survey deployment

Training checklist

- ❑ Include all survey team members in the training
- ❑ Allocate sufficient time for thorough training
- ❑ Explain the survey approach, questionnaire structure and format
- ❑ Include topics beyond the questionnaire
  - ❑ Humanitarian principles: confidentiality, sensitivity, integrity, informed consent
  - ❑ Assessment objectives and methodology
  - ❑ Roles and responsibilities of team members
  - ❑ Sampling plan and logistics
- ❑ Seek enumerator feedback, questions, and concerns
- ❑ Field simulation - pre-test
  - ❑ Data uploading simulation: practice technological aspects
- ❑ Ensure enumerators understand how answers will be used
- ❑ Create enumerators manual

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Preparing to implement M&E surveys

Resourcing and Logistics during survey deployment

Adhere to ethical guidelines	● Respect participant rights and confidentiality ● Obtain informed consent ● Handle sensitive information with care
Field Coordination	Provide and welcome regular field updates on: ● Progress, ● Issues(risks)
Data Collection Quality Control	● Supervise data collectors: Ensure accurate data collection ● Spot-check surveys: Verify data accuracy and completeness ● Use real-time data monitoring tools: Identify and correct errors early

Preparing to implement M&E surveys

Resourcing and Logistics after survey deployment

Data Management	• Secure data storage: Protect data from loss or tampering • Data cleaning: Review and correct data entries • Data backup: Ensure multiple copies of data are saved securely
Data Analysis	• Conduct preliminary analysis: Identify trends and anomalies • Detailed analysis: Use statistical methods to interpret data • Triangulate findings: Cross-check with other data sources
Lessons Learned and Improvement	• Conduct debriefings: Review what worked well and what didn't • Document lessons learned: Create a record for future reference • Update M&E plans: Improve methodologies and practices for next surveys

Preparing to implement M&E surveys

Resourcing and Logistics for survey deployment

A generic Survey Timeline

Activity	Month 1	2	3	4	5	6	7	8	9	10	11	12
PLANNING AND LOGISTICS												
QUESTIONNAIRE DESIGN												
SAMPLING AND LISTING												
DATA PROCESSING PREPARATION												
FIELD STAFF TRAINING AND FIELDWORK												
PROCESSING												
DATA ANALYSIS AND TABULATION												
REPORT WRITING AND DISSEMINATION												
EVALUATION												
ARCHIVING												

Source:UNDP 2022

Implementing M&E Surveys

Implementing M&E (Quantitative)Surveys

Data collection methods and tools

Surveys can be administered in different ways, such as in-person interviews, phone interviews or as paper or online questionnaires that require participants to write their answers.

In-person interviews

Phone interviews

Online interviews

Paper questionnaires

Implementing M&E (Quantitative)Surveys

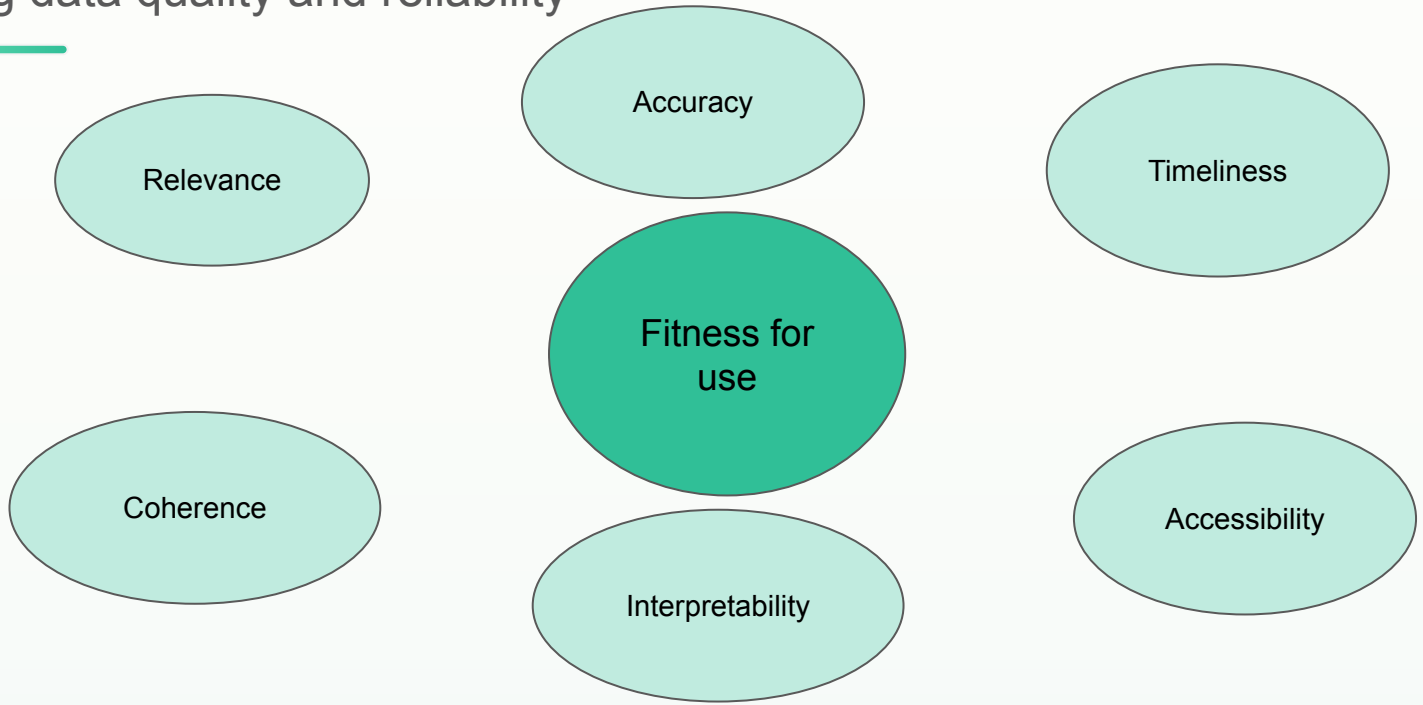
Data collection methods and tools

Tools and Resources

- **Survey Design**: Online survey platforms, electronic survey tools
- **Sampling**: Sample size calculators, statistical sampling software
- **Data Analysis**: Statistical analysis software, spreadsheet software, data analysis programming languages

Implementing M&E (Quantitative)Surveys

Ensuring data quality and reliability



Dimensions of survey quality

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Implementing M&E (Quantitative)Surveys

Data quality enforcement (examples with ActivityInfo)

Sample size calculator

Sample size calculator for needs assessments and KAP surveys

Go to the calculator

$$n = \frac{m}{1 + \frac{m-1}{N}} \qquad m = \frac{z^2_{\alpha/2}\hat{p}(1-\hat{p})}{\epsilon^2}$$

Where $\hat{p}$ is the expected proportion in the population,

ϵ is the allowable margin of error, and $z^2_{\alpha/2}$ is the z-Score that corresponds to the 95% confidence level.

Sample size calculator for baseline and endline surveys

Go to the calculator

$$n = (Z_{\alpha/2} + Z_{\beta})^2 \frac{fp_1(1-p_1) + fp_2(1-p_2)}{(p_1 - p_2)^2}$$

Calculate design effect from cluster surveys

Go to the calculator

Intra-cluster correlation coefficient (ICC)

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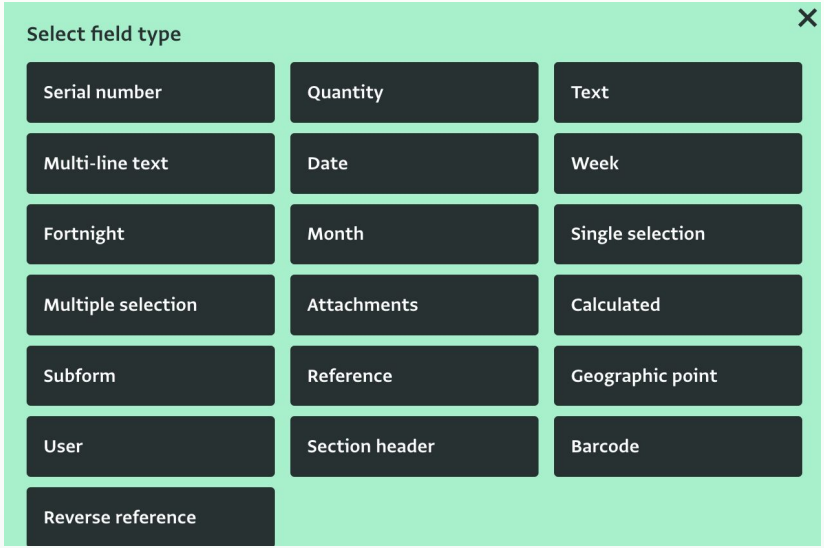
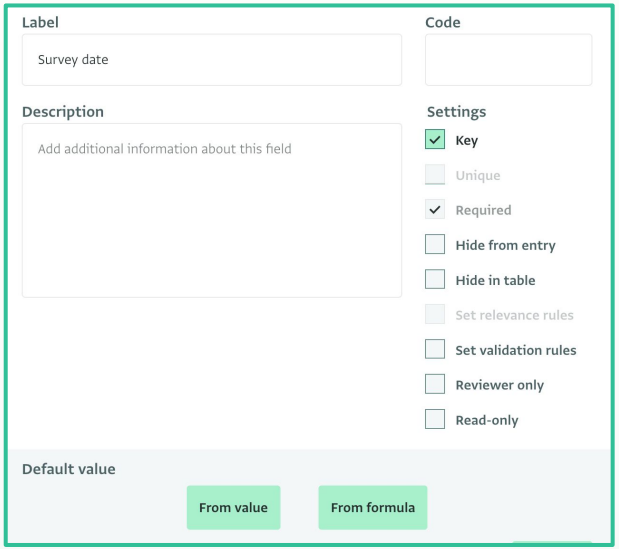
Implementing M&E (Quantitative)Surveys

Data quality enforcement (examples with ActivityInfo)

Field types



Field properties



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Implementing M&E (Quantitative)Surveys

Data quality enforcement (examples with ActivityInfo)

Restrictions

- Text Fields
  a. Character Limits
  b. Validation Rules
- Numeric Fields
  a. Range Limits
  b. Decimal Precision
- Date Fields
  a. Date Format
  b. Valid Date Range
- Dropdown Lists
  a. Predefined Options
  b. Cascading Dropdowns
  c. Controlled Choices
- Location Fields
  a. Geographical Constraints
  b. Coordinate Validation
- File Uploads
  a. File type Limitations
- Required Fields
  a. Mandatory Completion
- Data Entry Constraints
  a. Input Masks
- Key fields
- Relevance rules

Automated Calculations

- Calculated fields
- Default Values
  - Pre-Filled Data

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Additional topics

Monitoring results of the survey

Ongoing quality control

Real-Time Data Monitoring

- ❏ **Use Digital Tools**: Utilize mobile data collection tools that allow for real-time data entry and monitoring.
- ❏ **Dashboard Monitoring**: Set up dashboards to monitor incoming data in real-time. This helps identify patterns, inconsistencies, or gaps as data is being collected.

Regular Check-ins

- ❏ **Daily Briefings**: Conduct daily briefings with enumerators to review the day's work, discuss challenges, and provide feedback.
- ❏ **Spot Checks**: Randomly select a subset of completed surveys each day to review for accuracy and completeness.

Monitoring results of the survey

Ongoing quality control

Data Validation Techniques

- ❏ **Consistency Checks**: Implement automated consistency checks in the survey tool to flag inconsistent or illogical responses.
- ❏ **GPS Tracking**: Use GPS coordinates to verify that enumerators are conducting surveys in the correct locations.

Back-Check Surveys(*in rare cases. Consider respondent fatigue and guard against it***)**

- ❏ **Conduct Back-Checks**: Have a separate team or supervisors re-administer the survey to a small percentage of respondents to verify the accuracy of the original data.
- ❏ **Comparison Analysis**: Compare back-check data with the original data to identify discrepancies.

Use of Redundant Questions

- ❏ **Incorporate Redundant Questions**: Design the survey to include redundant questions that can help cross-verify responses for consistency.
- ❏ **Triangulate Data**: Use multiple questions to triangulate and validate critical information.

Analysis of results

Indicator Analysis		Analyze indicators by various demographic factors (e.g., age, gender, location) to understand different impacts on subgroups.
Cross-Tabulation and Subgroup Analysis		Identify important subgroups based on demographic or other relevant factors (e.g., age, gender, geographic location).and compare to understand differential impacts.
Statistical Analysis		Descriptive statistics,inferential statistics,trend analysis,significance testing
Visualization and Reporting		Clarity, simplicity,relevance,variety of formats and storytelling

Analysis of results (examples with ActivityInfo)

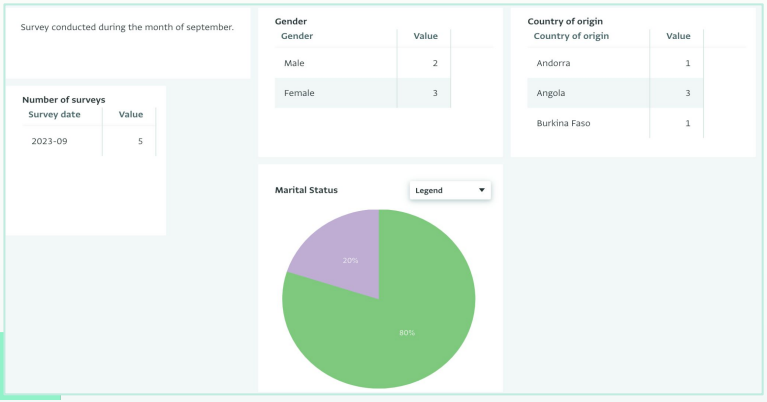
Indicator Analysis

Indicator Tracking

Measures	Value
% of household who report using at one negative coping strategy...	20%
% of households who report being able to meet their basic needs...	20%
% of beneficiaries reporting being satisfied with the provided assi...	80%

Disaggregation per gender

Measures	Male
% of household who report using at one negative coping strategy...	0.0%
% of households who report being able to meet their basic needs...	50.0%
% of beneficiaries reporting being satisfied with the provided assi...	100%



Cross-Tabulation and Subgroup Analysis

Visualization and Reporting

Demo

Ethical considerations

Informed Consent

- Voluntary Participation: Ensure that all participants voluntarily agree to take part in the survey.
- Clear Information: Provide clear, understandable information about the survey's purpose, procedures, risks, and benefits.
- Consent Documentation: Obtain written or verbal consent as appropriate, and document this process.

Do no harm

- Minimize Risk: Design surveys to minimize any potential harm or distress to participants.
- Cultural Sensitivity: Be aware of and respect local customs, traditions, and social norms.
- Emotional Support: Provide resources or referrals for participants who may experience emotional distress during the survey.

Confidentiality and Privacy

- Anonymity: Ensure that responses are anonymized to protect participants' identities.
- Data Protection: Implement strong data security measures to safeguard personal information.
- Limited Access: Restrict access to personal data to authorized personnel only.

Ethical considerations

Respect and Dignity

- Respect for Participants: Treat all participants with respect and dignity, regardless of their background or circumstances.
- Non-Discrimination: Ensure inclusivity and non-discrimination in participant selection and treatment.
- Respect for Autonomy: Allow participants to withdraw from the survey at any time without any negative consequences.

Equity and Accountability

- Accountability: Hold yourself and your team accountable for adhering to ethical standards and addressing any ethical issues that arise.
- Fair Selection: Ensure fair and equitable selection of participants to avoid bias and exclusion.
- Access to Participation: Make sure that all segments of the affected population have an opportunity to participate.

Beneficence

- Maximize Benefits: Design the survey to maximize potential benefits for participants and the community.
- Use of Findings: Ensure that the findings are used to improve humanitarian interventions and address the needs of the affected population.

Key messages

Key Continuous Activities in Survey Implementation

- **Operation Evaluation**
  - Implement a systematic quality assurance mechanism.
  - Focus on effective and efficient procedures.
  - Enhance quality and timeliness of the operation.
  - Integrate into standard operational procedures for all phases and tasks.

Q1: How effective are the current procedures in ensuring timely data collection and processing?

Q2:What improvements can be made to enhance the quality assurance mechanisms during each phase of the survey ?

- **Systematic Archiving**
  - Archive all documentation produced during the operation.
  - Establish clear archiving rules and define the repository and archiving structure.
  - Document the archiving procedure for consistent management.

Q1: What criteria should be used to define the repository structure for archiving survey documents?

Q2:How will the archiving procedure be documented and communicated to all team members?

Resources

- United Nations High Commissioner for Refugees
- International Organization for Migration
-

Questions?

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