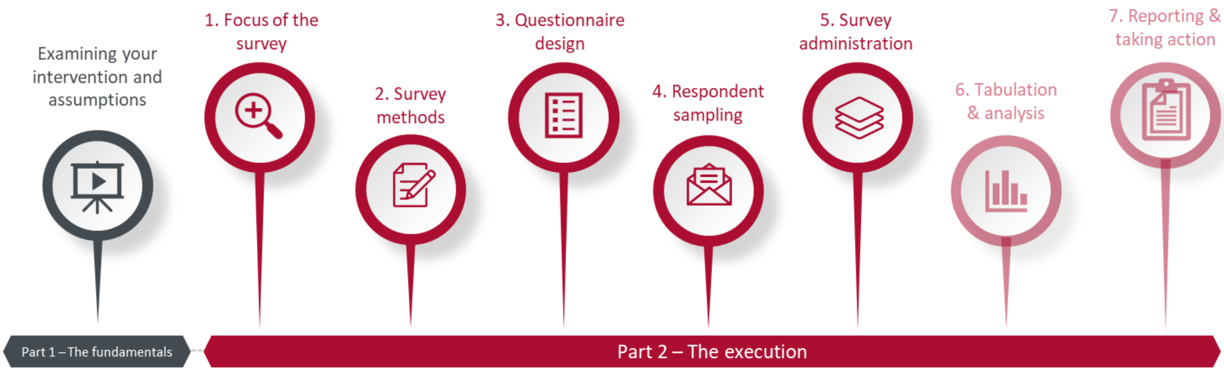
MODULE 5. ADMINISTER THE SURVEY IN THE FIELD



After putting a lot of effort into designing a great survey, it is time to finally implement it! But before rushing to the phone (or hitting the 'send email' button) there are still a few steps to plan to ensure a successful data collection.

Keep in mind that, even if you crafted the best possible survey, collecting enough quality answers can be challenging. The process can take longer than you would have hoped, for reasons not always in your control. To avoid a disappointing outcome, make sure to plan the practical aspects of survey implementation as carefully as possible, both before and during rollout.

Before survey rollout

Before starting your survey, it is crucial to test the content of your questionnaire. While you may feel that you already polished it, piloting your questionnaire on a few respondents (5-10) will help you detect unforeseen issues, before you deploy it further to all respondents. The two crucial aspects to test are:

- The understanding of the questions: the respondents must have no problem understanding what you are asking them. By checking a sample of answers, you will be able to detect if some questions are being misunderstood, in which case you should reformulate them.
- The technical aspects: is the tool on which you run the questionnaire working properly? Are the questions being displayed in the right order, including questions with skip logic? Are the answers saved and submitted without issues?

If you discover any flaw or need for improvement, proceed with the changes before implementing the survey at a larger scale.

In addition, you need to prepare a precise schedule for the surveying activities. You should give yourself a target date to complete the data collection and work backwards to set weekly deadlines and objectives. This should include a specific plan for follow-ups with individuals who don't answer the survey at first contact (e.g., email reminders, calling back, etc.). It is advisable to aim at completing the survey within 2-4 weeks.

You should make sure to also clarify roles and responsibilities within your team and/or any external provider with regards to running the survey, tracking quality of delivery and monitoring progress. This will allow you to better identify potential issues and intervene quickly.

Finally, in the case of a face-to-face or phone survey, it is important that the people performing the survey are properly trained and prepared. They must understand each question and know why it is being asked. They should also be trained to record the responses in the same way.

During survey rollout

Once the survey is running, your main task is to keep its progression under control. To do this, it is important to:

- Regularly check metrics such as refusal rate, failed contacts and the share of people stopping midway. If these numbers are higher than expected, try to identify the reasons, and find a solution as quickly as possible. This monitoring should happen daily, especially at the beginning
- Keep track of the representativeness of your respondents against the sampling characteristics you selected in *Module 4*, to minimize problems of self-selection and different response rates across groups. While you have little control over the willingness to answer your survey, try to identify and alleviate any practical barriers that might systematically impact the ability of some respondents to participate. It can be, for instance, that women answer more regularly to your phone survey than men because women tend to be more available at the time when your team makes the calls. If you do not intervene early to change the time of the calls, you might end up with an overrepresentation of women in your sample, which will make the results less reliable
- After surveying around 10% of your sample, check again the overall quality of the answers, to identify potential issues with the questionnaire or the interviewers. If you are running a phone survey, you might want to listen regularly to the interviewers to check the quality of their work. Due to cultural or organizational reasons, some interviewers might perform less well than others, or will not report negative answers truthfully.

Special focus: increasing the response rate

A low response rate is a common problem, and one you already anticipated. However, if your response rate is much lower than expected, you should try to intervene to correct this problem. Besides a systematic approach for following up with non-respondents (the more personalized, the better), here are a few ideas to consider:

- Reduce survey length: in some cases (especially for online surveys), respondents start answering but drop off midway because the questionnaire takes too long to complete. If this is case, try to cut some questions by looking at the answers you received so far to identify the questions that add least value.
- Provide incentives: you could introduce a small reward for people who complete the survey. This could be, for example, the chance to win a small voucher or prize. If you do this, remember to modify the survey introduction to mention this reward in a prominent way, and, if you have an anonymous survey, make sure to ask for contact details of the respondent, to be able to deliver the reward.
- Pick a different survey methodology: maybe the methodology you selected is not the best one for your targeted respondents (or at least not for all of them). You could add another methodology, for example phone calls in addition to SMS or emails.
- Target more contacts: if you are not able to improve your response rate, you may be able to achieve your desired sample size simply by contacting more people. However, you might be limited by the size of your target population (go back to the *Module 4* exercise sheet to check).