# USAID POVERTY ASSESSMENT TOOLS
# IMPLEMENTATION TRAINING MATERIALS

The training materials used in the USAID PAT Implementation regional trainings are included on the povertytools.org website as an additional resource to assist in teaching the implementation method as well as enhance a user's understanding of individual topics. The included materials are ***not required*** to be used by anyone or any organization training others on PAT implementation, nor are they intended to be an exhaustive set of materials needed to teach an entire 5-day course. Informed trainers are expected to provide verbal instruction, clarifications and guidance to participants in addition to the use of these training materials.

The time necessary to review each topic thoroughly depends upon the participants' prior knowledge and skill levels. The five-day schedule allows for ample time to review topics after formal training sessions, to include time for questions, and be flexible enough for a possible trip to the field to practice interviewing clients. It often takes one session to teach a topic and one or two sessions to review the topics for participants to understand and retain the information. If the participants have the ability to attain the information presented in each session within a short period of time, then the entire training may only take 3-4 days or less. It is recommended to base the time for training on the ability of the participants to absorb the knowledge rather than to minimize the total training time. A trainer may select to teach only certain topics to people fulfilling only certain roles in the implementation process. This, too, will decrease training time, but it is important that each person understand how to perform her or his role well.

In addition to the training materials provided, an instructor also needs to download the software program Epi Info from the Center for Disease Controls website and at least one tool and Epi Info template from http://www.povertytools.org/USAID_Tools/USAID_Tools.htm. The documents in each file are numbered in the order that they should be introduced.

The training materials have been developed by The IRIS Center at the University of Maryland, College Park. Please contact pathelp@iris.econ.umd.edu if you have any questions.

## Training Goals

*By the end of a thorough training, participants should know how to:*

1. Achieve a basic understanding of the legislative mandates for the Poverty Assessment Tools (PATs), USAID's goals for developing the tools and the requirements for reporting. Understand the conceptual framework and process for developing indicator-based tools that are being used to assess the poverty level of clients.

2. Be familiar with the features of, and know how to use well, the quantitative poverty assessment tools, employing at least one of the three methods: intake, on-going monitoring, or household survey.

3. Be familiar with the implications of the gender of the respondent and the interviewer being the same or different, the gender-impacted nature of intra-household transfers, expenses and income, and learn other sensitivities to gender issues to be included in the process of data collection.

4. Know the steps to be taken to develop a sampling frame for implementing a PAT.

5. Develop a basic knowledge of how to input data, combine files, and generate basic results in the EPI Info program.

6. Create a realistic implementation plan to fully understand the PAT implementation process and be able to teach this process to others. The goal of refining the sample design, number of interviewers, and plan is given strong emphasis in this workshop. The expectation is that participants can return to their organizations with a clear plan on paper that includes all the steps to be taken, the types of personnel and resources needed, preliminary dates, and all the elements required to teach others how to carry out the assessment.

7. Understand what responsibilities and skills will be required of the persons filling each job assignment. Determine the time that will be required to train the people in each position in order to teach others to develop a draft training agenda.

8. Become familiar with additional resources to assist both trainers and implementers of the PAT. Know how to use and where to find the Manual, CD Rom, PAT Help Desk, and Poverty Tools web page.

# <u>Sample Workshop Agenda</u>

## <u>*Day One: Monday*</u>
## *Introduction to the Poverty Assessment Tools and USAID Reporting Requirements*

***Block 1: 9:00-10:45am – Introduction to Week of Training and Content***
- Welcome and introduction of facilitators
- Introduction of the Participants
- Discussion of workshop goals and overview of agenda and expectations
- Volunteers for Monday through Friday

<u>Introduction to Content of Workshop:</u>
- What is poverty? What is poverty as defined by the legislation?
- Goals of US Congressional Legislation and USAID Mandate
- Reporting requirements and training qualifications, Q & A
- Introduction of Sampling Exercise
- Take poll of laptops, installation of EPI Info and begin installing training files

***Break: 10:45-11:00 am***

***Block 2: 11:00-12:30pm – Development of the USAID Tools and Tool Implementation Process***
- Overview of the development of the USAID tools
- Overview of the Implementation Process and the requirements for the implementing organization
- Introduction to Manual, its sections and appendices (each day, the trainers will assign readings that participants need to read in detail before the following day)
- Discuss definition of household

***Lunch: 12:30-1:30 pm***

***Block 3: 1:30-3:00 pm – Review of Morning Session and Introduction to the Tools***
- Review definition of “very poor” and requirements of implementation
- Q and A on any topic from the morning session
- Explanation of indicator selection in more detail
- Discuss reasons for survey length, survey format and question construction

***Break 3:00-3:15 pm***

***Block 4: 3:15-4:45 pm - Review of Tools***
*Break into 2 groups to look at a country tool.*
- Read the whole tool silently first with no questions asked.
- Go back through the tool as a group, question by question. Understand how to fill in the information at the top of the tool. For each poverty indicator question, make sure that the purpose is fully understood (reference Attachment C: Implementer’s Guide in manual).

***Block 5: 4:45-5:00pm – Review Training Session of Day 1 (Plenary)***

- Have volunteer give brief review of the activities of the day.
- Facilitators review key lessons from the day (for example: two definitions for "very poor," key components of implementation process, key features and limitations of the USAID PATs).
- Verbal feedback from participants.
- Assign material to read for the following day.

## ***Day Two: Tuesday***
## ***Interviewing, Job Descriptions and Gender Sensitivity***

***Block 1: 9:00-10:45 – Introduction to Interviewing***

- Introduction of quantitative techniques.
- Volunteers participate in bad interview/good interview exercise.
- Discuss interviewing techniques
- Discuss techniques for training interviewers

***Break: 10:45-11:00 am***

***Block 2: 11:00-12:30 pm - Practice and discussion of Interviewing***

- Practice using a tool in groups of three (Client, Interviewer, and Observer).
- Return to group and discuss lessons learned.
- Discuss importance of Focus Group Discussions during interviewer training.

***Lunch: 12:30-1:30 pm***

***Block 3: 1:30-3:15 pm – Job Descriptions for the Different Types of Personnel and Selection of Trainees***

- Review the standard job descriptions for each type of personnel in the Manual and additional input needed from other staff members. These roles include project manager; interviewer; field supervisor; data processor; data entry coordinator; role of executive director in implementation; role of financial person (accounting for funds spent; etc.).
- Hand out descriptions, allow participants to read them for 10 minutes, and then do a role play identifying the persons to handle each situation.
- Discuss potential problems and how to handle them.
- Estimate the amount of training that is needed for each job assignment based on the particular personnel chosen for each of the different roles.

***Break: 3:15-3:30 pm***

***Block 4: 3:30-4:45 – Review of USAID Tools and the Implementation Process***

- Exercise reviewing lessons learned in workshop thus far.

***Block 5: 4:45-5:00pm – Ending Session Day 2***

- Volunteer reviews activities of the day.

- Assign material to read for following day.

## *Day Three: Wednesday*
## *EPI Info, Quality Control and Gender Sensitivity*

***Block 1: 9:00-10:45 am – Introduction to EPI Info***

Using projections on screen, the trainer walks the participants through the data processing screens on his computer. Participants will learn:

- Basic orientation to the program and its commands.
- How to input data.
- How to clean the data.
- How to combine files if more than one individual is doing data processing.
- How to prepare the basic analysis (frequencies, etc.) required by USAID.

Participants will practice with the data that is provided for training. If applicable, both participants from each organization should practice inputting data. A trainer will describe the EPI Info assignment to be completed by participants.

***Break: 10:45-11:00 am***

***Block 2: 11:00-12:30pm – Work on EPI Assignment***

- Work on EPI exercise assigned earlier. During the time block, Brian, Megan and Maros will rotate to each of the groups to clear up any remaining doubts or problems participants may have about how to manage the software and complete the exercise.

***Lunch: 12:30-1:30 pm***

***Block 3: 1:30-3:15 pm – Quality Control***

- Levels of quality control and ways to implement it
- Quality control using EPI Info

***Break 3:15-3:30 pm***

***Block 4: 3:30-4:45pm – The Importance of Maintaining Gender Sensitivity during the Data Collection Process***

- Discuss how gender differences can affect the interview process.
- Discuss intra-household differences in wealth and consumption.
- Participants break into pairs to discuss ways to probe respondents for more accurate answers. Present answers.

***Block 5: 4:45-5:00pm – Ending Session Day 3***

- Volunteer reviews activities of the day.
- Facilitators review key lessons from the day.

- Assign material to read for following day.

## *Day Four: Thursday*
## *Epi Info Review, Sampling and Sample Implementation Plan*

Note: Participants from each organization will need a computer during this entire day to work on EPI Info and the sample Implementation Plan.

***Block 1: 9:00-10:15 am – Review EPI Info and work on additional assignment***
- Review of basic functions of EPI Info, maintaining correct sample numbers when cleaning data and handling errors.
- Work on second EPI Info assignment. During the time block, Brian, Anthony and Megan other trainers will rotate to each of the groups to clear up any remaining doubts or problems participants may have about how to manage the software and complete their exercise.
- Facilitators answer any remaining questions on EPI or sampling.
- Time permitting, begin sample implementation plan.

***Break: 10:15-10:30 am***

***Block 2: 10:30-12:30 pm – Quantitative Sampling***
- Presentation of results of the sampling exercise with marbles.
- Discussion and presentation on how to create a sampling plan for implementation.
- Each group will begin with client information and the sampling criteria (if data on a specific organization is not available, another example can be used).

***Lunch: 12:30-1:30 pm***

***Block 3: 1:30-3:00 pm – Sample Implementation Plan***
- Solve any remaining sampling problems.
- Introduction of sample Implementation Plan exercise.
- Participants will begin work on a sample Implementation Plan. Participants will be creating their sample plans in PowerPoint to use as a teaching aid in the future. Participants are also encouraged to present their plans at the end of the day or Friday morning. The plan will include slides which explain each major step of the plan and the timing (institutional information, pre-implementation, sampling, human resources, number of interviewers needed, interviewing logistics, input data, timing for each section of the project and the budget). Each group also needs to produce a practice budget and a timeline. A Gantt chart is not essential, but it can be quite helpful.

***Break 3:00-3:15 pm***

***Block 4: 3:15pm-4:15pm – Continuing work on the Plan***

***Block 5: 4:15-5:00pm – Review for PAT Implementation Exam and Ending Session Day 4***
- Review topics to be covered on exam. Discussion of purpose and grading of exam.

- Q and A on the exam.
- Volunteer participant will briefly review what was learned during the day.
- Facilitators review key lessons from the day.

## ***<u>Day Five: Friday</u>***
## ***Finish and Present Implementation Plans, PAT Implementation Exam & Closing***

Note: The pair of participants from each organization will need a computer during the morning to work on the Implementation Plan.

***Block 1: 9:00am-10:45am — Presentations of Implementation Plan***

- Presentations of plans by representative of the group which produced it.
- Critique and review presentations by other participants on technical parts of presenters' plan. Participants will use the information and techniques learned in the course to assist fellow learners in improving the plans before returning to train others in designing implementation plans.

***Break: 10:45-11:00 am***

***Block 2: 11:00-12:30pm – Presentations and Suggestions***

- Continue presentations and discussions of implementation plan.

***Lunch: 12:30-1:30 pm***

***Block 3: 1:30-2:30pm - PAT Implementation Exam***

- Participants complete exam.

***Break 2:30-2:45 pm***

***Block 4: 2:45-4:00 – Ending Session of Day 5 and the Workshop***

- Review exam.
- Discussion of the available resources to assist implementers. Participants become familiar with resources such as the Manual, CD, PAT Help Desk and Poverty Tools web page.
- Review of the day and week by volunteer participant.
- Participants complete the week's course evaluation form for IRIS and facilitators.
- Participants' concluding remarks.
- Instructors', USAID's and IRIS's concluding remarks.
- Certificates of completion of implementation training given to participants.