Qualifications, Roles and Responsibilities of the Implementation Team

Skilled personnel who are well trained and motivated can strongly influence the success of your field operation. The implementation team for the Poverty Assessment Tool should include an overall project manager, two field supervisors, 5-8 interviewers, a tracking coordinator, a data processing coordinator, and two data entry personnel. Depending on the skills and available time of the project manager, an additional member of the research team can be helpful for overseeing the time and resources used in each step of the process. It also might be appropriate for an MIS manager to oversee the data analysis.

The Implementation Team should include the following members:

- Project Manager: oversees planning and implementation of the field survey.

- Field Supervisors: coordinate daily activities of interviewers and performs quality control in the field.

- Interviewers: thoroughly learn survey questions and interview techniques to minimize bias, and conduct interviews in a confident and relaxed manner.

- Sampling and Survey Tracking Coordinator: creates and maintains tracking system for survey implementation; ensures sampling plan is maintained.

- Data Processing Coordinator: identifies and trains data processors and maintains quality control in data processing

- Data Processors: enter and clean data collected in the survey, and possibly help with generation of client lists for sampling and data analysis.

Project Manager

A project manager will take overall responsibility for planning and implementing the field survey. The manager will oversee and participate in the training of staff, supervise the translation of the survey, and verify that the sampling is being done correctly and that only sampled clients are being interviewed. He or she will monitor progress towards completing the survey and will do "spot checks" to verify that interviewers are following the questionnaires consistently during interviews and filling in the forms correctly and completely, and that the supervisors are carrying out their quality control function. The manager will monitor the team's progress in staying on schedule and within budget as the field work progresses. Ideally, the manager will have previous assessment or monitoring and evaluation experience, as well as an excellent track record for successfully managing resources and personnel. The project manager should complete the following tasks:

Tasks
During Planning/Training
- Hire/assign team members
- Plan, implement, oversee training with field supervisor
- Develop implementation plan (schedule, logistics, etc.)
- Qualitative review of training materials, sample, questionnaire, and internal control system
- Questionnaire translation and editing

During Interviewing
- Communicate with field supervisor on a regular basis
- Inquire on a regular basis about results vs. targets

During Data Processing
- Inquire about data entry issues and results vs. targets
- Conduct spot checks

Throughout:
- Budget
- Communications with Help Desk, as needed
- Submit deliverables
- Ability to troubleshoot and devise back-up plans if necessary

Required Qualifications/Competencies
- Project management experience
- Staff management experience
- Monitoring & evaluation experience
- Budget management experience
- Good communications skills
- Team spirit/motivates staff
- Capable of delegating responsibilities
- Ability to translate final objective to field staff
- Knowledge of local context

- Good report writer

Field Supervisors

It is recommended that two field supervisors manage between three and four interviewers each. Obviously, only one field supervisor may be used if the travel logistics permit the use of one interview team for the field work. They should help with the interviewer training and translation of the survey. Field supervisors are responsible for coordinating the daily activities of the interviewers, including arranging movement to and from interviews and transport from one survey site to the next. Supervisors also take responsibility for strict quality control, including ensuring that the questionnaires are filled out correctly and completely and that the information contained in them is accurate before leaving each survey area. Field supervisors check the work of each interviewer on a daily basis to minimize the number of errors and missing values. Supervisors also conduct occasional random spot checks to verify the accuracy of data by partially repeating a household interview without the interviewer being present.

Field supervisors report regularly to the manager on progress, costs incurred, and any irregularities in the field. Supervisors should have prior experience in conducting quantitative surveys, have strong leadership skills, excellent attention to details and time management, and be assertive in supervising interviewers to ensure that high-quality data is collected.

Tasks
During Planning/Training
-   Help with translation of survey
-   Plan fieldwork logistics (transport, schedules, distribution of interviewers)
-   Help with interviewer training

During Interviewing
-   Coordinate daily activities of the interviewers
-   Quality control (questionnaires filled correctly, completely, random spot checks)
-   Check/observation of interview process
-   Report to project manager (progress and irregularities)

During Data Processing
-   Solve questions (data processors)

Required Qualifications/Competencies
-   Prior experience in conducting quantitative surveys (including as an interviewer)
-   Strong leadership skills (assertive in supervising interviewers; listening skills)
-   Attention to detail
-   Time management
-   Ability to receive criticism/to provide constructive criticism
-   Initiative to take decisions and solve problems on the spot

Interviewers

Interviewers with prior field and survey experience are desirable, but just as important are individuals with strong communication skills who can carry out interviews in a confident and relaxed manner while maintaining their train of thought. All interviewers require thorough training that includes in-depth review of the questionnaire to understand its intent and repeated practice in posing the questions in the local language.

Do not send field staff to interview clients with whom they have had previous business or personal relations. Institutions have the option to use administrative staff or to use field staff from other regions so that they do not interview anyone they know.

Tasks
During Planning/Training
  - Participate in training
  - Understand the aim of the survey
  - Review the questionnaire
  - Repeat practice in interviewing, using the questionnaire
  - Role play
  - Be available throughout the training process

During Interviewing
  - Respect the schedule and planning process
  - Respect clients and adapt questionnaire to their level of education and ability to understand
  - Follow instructions
  - Ask questions with precision
  - Record information accurately
  - Use probing questions when necessary
  - Keep the same quality of work throughout the process
  - Resolve any logistic or other problems or report to the field supervisor as necessary
  - Take an active part in the de-briefing process
  - Be aware of process issues

Qualifications/Competencies
  - Knowledge of local language
  - Previous field experience
  - Observation skills
  - Recording skills
  - Problem-solving skills
  - Willingness to follow instructions and accept supervision
  - Precision in asking and recording information
  - Good disposition and ability to put the interviewee at ease
  - Efficiency in getting the interviewer done while meeting all the cultural norms for politeness, thus leaving a good (or at least neutral) impression about the MEP in the mind of the interviewee

- Curiosity about the research topic that will lead to better probing, insuring that they are recording what the interviewee said and not what they preconceived about what the person "should say"
- Culturally acceptable appearance
- Willingness to work long hours while maintaining the same quality in the last interview as in the first interview
- Ability to observe body language, the quality of house construction, the setting in the house, the tools and stock in the business, etc. that can lead to probing questions when the answers seem to contradict what is being seen.

Sampling and Survey Tracking Coordinator

The Tracking Coordinator plays a key role in tracking the progress of survey implementation and maintaining the sampling plan.

Tasks
During Planning/Training
-   Work with Project Manager and Field Supervisor to set up numbering system for all surveys: quantitative and test surveys, including replacement selections for each sampling category.
-   Participate in sampling selection and oversee the assignment of survey numbers.
-   Set up a system to monitor location and status of each survey, including the assignment of surveys from the replacement list.
-   Assist with training, as needed.

During Interviewing
-   Monitor distribution and collection of surveys from each sampling group, including constant communication with all Team Leaders and Project Manager (or Coordinator) to ensure that all production goals are being met.
-   Assist with quality control of surveys and returning of surveys to the field, if necessary.
-   Make daily contributions to newsletter, if sending one out to the interview teams.
-   Assist with supervision of data processing and other duties, as needed.

During Data Processing
-   Confirm that all surveys have been handed in and are completely filled out.
-   Compile statistics totaling number of surveys completed for each sampling group and supervise a physical counting of documents to confirm the totals.
-   Assist with data cleaning and analysis, and with all tasks involved in generating statistics, graphs and tables for the final report.
-   Assist in final organization of computer files and filled in questionnaires.

Required Qualifications/competencies
Education
-   Degree in social sciences or equivalent

Experience
-   Research experience
-   Team management
-   Work experience in MFI/development institution (2 years or more)
-   Can make quick decisions

Data Processing Coordinator

This coordinator oversees the data processing system. S/he trains the data processors and performs spot checks to ensure data is accurately entered into the system. Specific tasks include:

Tasks
During Planning/Training
- Lead training on EPI Info (see Chapter 7), survey coding and data entry techniques.
- Participate in survey design and how that affects the data input and forms.
- Install EPI Info software and copy all pertinent files containing forms and procedures to hard drive of all applicable computers.
- After supervising coding of alpha answers from surveys and the creation of controls for data entry, personally test data entry.
- After any changes are made to survey questions and layout, ensure that changes are reflected in files on EPI Info.
- Directly oversee data entry of first few surveys to ensure everything is being done correctly.

During Interviewing and Data Processing
- Participate in and oversee quality control of survey forms, and make sure that incomplete forms are returned to appropriate supervisors for completion.
- Continue to monitor coding of alpha answers to ensure consistency and coherency.
- Solve EPI problems that come up each day.
- Supervise data input and cleaning.
- With other team leaders, set up a standard format for distributing updates and corrections to all members of evaluation process (bulletin/newsletter)—and contribute information daily to this newsletter.

Finalizing Data Processing and Analysis
- Make sure that all surveys have been entered and re-entered.
- Data cleaning to ensure all records are complete and properly entered.
- Meet with Project Manager (or Coordinator), team leaders, program executive management, and in-country consultant to discuss specific goals for data analysis (if further analysis is carried out).
- Begin analysis of data, including demographical information for interviewees.
- Assist all personnel working on final report in the retrieval of data, analysis, and creation of tables and graphs for presentation of data.
- After data analysis is completed, assist Project Manager (or Coordinator) in organization and copying of all files onto disks or laptops, and also onto various locations of program computers, as requested.
- Ensure survey forms are filed and kept in a safe and accessible place.

Required Qualifications/Competencies
- Professional degree in data processing
- Experience in data analysis
- Ability to ensure confidentiality
- Leadership capabilities

- Teamwork
- Good communication
- Decision-making initiative

Data Processors

Those entering the survey data into the computer should have experience in both data entry and related quality control procedures. It would be preferable for them to have experience in the "cleaning" of statistical data, the ability to sort and extract client lists from the MIS to be used for sampling, as well as some basic knowledge of statistical analysis. The ability to create graphs in Excel and also use PowerPoint would help in the preparation of any presentations to be given to the management, Board and USAID.

In many cases, personnel involved in field operations may be the same as those who later participate in the data analysis. Even those with no statistical training can help those who do have it in interpreting what the results mean for your particular organization.

Tasks
During Planning/Training:
-   Receiving specialized training
-   Make/Discuss a plan of needs during the project (logistics, etc.)
-   Prepare equipment and test systems
-   Learn to use EPI Info

During Interviewing:
-   Finalize all equipment and systems (1st day)
-   Begin data entry daily
-   Report problems/obstacles to Data Processing Coordinator

During Data Processing:
-   Continue data entry
-   Quality control of your own work
-   Report problems to Data Processing Coordinator
-   Provide Data Processing Coordinator with requested information

Required Qualifications/Competencies
-   Two-three years experience in data entry (statistics a plus)
-   Knowledge/experience with MS Word, Excel, PowerPoint
-   Detail oriented
-   Availability throughout project period
-   Can keep data confidential

TIP: If an MEP does not have an in-house data processor, the organization could contact data processing companies in their own countries to see if they have suggestions about hiring staff, or to contract their data processors.