

Session 1B: Overview of Training and Learning Objectives

Workshop on Computer Assisted Personal Interviewing (CAPI)

31 July – 4 August 2017, Chiba, Japan



Outline

- What is a “case”?
- 4 Main Pieces
 - What are they?
 - What do they exchange?
- Life events of a case
- How the pieces fit together
- Each piece at a glance

What is a “case”?

- Case:
 - *a* : a set of circumstances or conditions <is the statement true in all three *cases*>
 - *b* (1) : a situation requiring investigation or action (as by the police) (2) : the object of investigation or consideration

In the context of this training, a case refers to a questionnaire applied to a particular household, holding, etc. Otherwise known as an “interview”. If the survey, “Farm survey” is administered to Holder Joe. Then the **questionnaire completed by interviewing Holder Joe is a specific case.**

What is a “case”?

Blank Questionnaire

2017 Agricultural Survey

1. Holder: _____

2. Age of holder: _____

3. Number of plots: _____

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Case

2017 Agricultural Survey

1. Holder: *Farmer Joe* _____

2. Age of holder: _____

3. Number of plots: _____

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Each case is a row in the Dataset

Review from Descriptive Statistics

Country	Land Area	Population	Rural	Health	Internet	Birth Rate	Life Expectancy	HIV
Afghanistan	652230	29021099	76	3.7	1.7	46.5	43.9	
Albania	27400	3143291	53.3	8.2	23.9	14.6	76.6	
Algeria	2381740	34373426	34.8	10.6	10.2	20.8	72.4	0.1
American Samoa	200	66107	7.7					
Andorra	470	83810	11.1	21.3	70.5	10.4		
Angola	1246700	18020668	43.3	6.8	3.1	42.9	47	2
Antigua and Barbuda	440	86634	69.5	11	75			
Argentina	2736600	39882080	8	13.7	28.1	17.3	75.3	0.5

The 4 Main Pieces: What are they?



– Designer, for creating questionnaires



– Headquarters, for centralized survey management



– Supervisor, for field-based survey management



– Interviewer, for data collection

The 4 Pieces: What do they exchange?

- Information



– Questionnaires—forms to assign



– Assignments—data collection tasks



– Data—information collected using a form



– Status—where an assignments sits in the survey workflow



Life events of a case

- **Conception** – Designer + Tester



- **Birth** – Import and assignment



- **School**



Events recorded



- **Career**










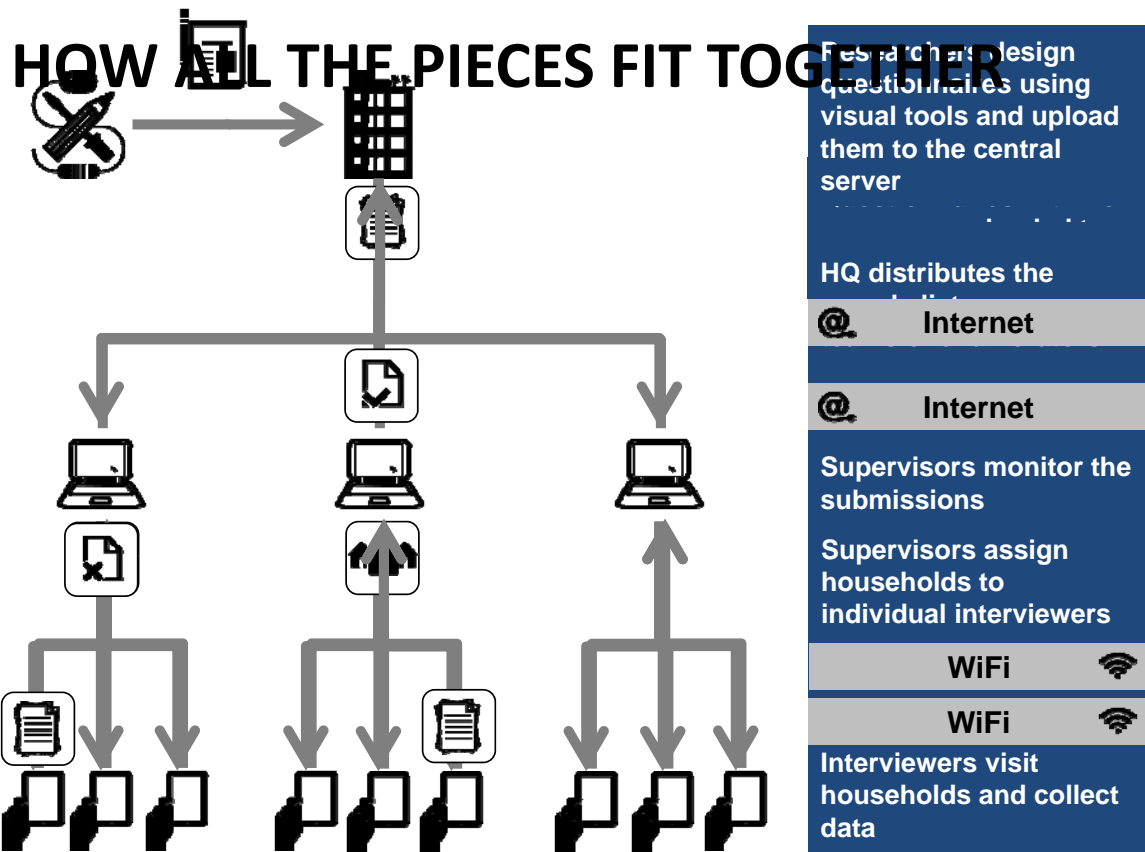
Events recorded - Paradata



- First Answer Set
- Completed

Life Events of a questionnaire

- **Retirement**  \longleftrightarrow  \longleftrightarrow  **Events recorded** 
- **Data Export**  OR  \longrightarrow 



Brief look at each piece



– Designer, for creating questionnaires



– Headquarters, for centralized survey management



– Supervisor, for field-based survey management



– Interviewer, for data collection



Designer

- **How used**

- ***Develop questionnaire content***—modules, rosters, questions
- ***Dictate skip patterns***—what should be answered under what conditions
- ***Program validation checks***—how answers should relate to one another and to known norms

- **Where to find it**

- Web: <https://solutions.worldbank.org/>



Designer, in images

The screenshot displays the Survey Designer interface for a questionnaire titled "DRAFT2 Tanzania NPS 2013/2014 Household Questionnaire (ST2Q, 30Q, 30R) (ENY)". The interface is divided into several sections:

- SECTION A-1: HOUSEHOLD IDENTIFICATION**: This section contains a list of questions related to household details, such as "REGION", "DISTRICT", "WARD", "VILLAGE/ENUMERATION AREA", "KITONGOR OR MTAJA NAME", "HOUSEHOLD ID (FROM LIST)", "NAME OF HOUSEHOLD HEAD", "NAME OF HOUSEHOLD HEAD FROM NPS YEAR 2", "FULL HOUSEHOLD IDENTIFICATION FROM NPS YEAR 2", "IS THIS HOUSEHOLD", "LOCATION OF HOUSEHOLD", "NAME OF TRACKING TARGET FROM NPS YEAR 2", "ROSTER ID OF TRACKING TARGET FROM NPS YEAR 2", "LOWEST ROSTER ID NUMBER", and "DESCRIPTION OF LOCATION OF HOUSEHOLD".
- SECTION A-2: SURVEY STAFF DETAILS**: This section includes questions for "TIME INTERVIEW START" and "OBSERVATIONS ON THE INTERVIEW".
- SECTION V: ANT** and **SECTION H: FOO**: These sections are partially visible at the bottom of the screen.

The right-hand side of the interface shows the configuration for a specific question (QUESTION TYPE: "region"). It includes a "variable name(s)" field with the value "region", a "validation message" field with the text "The region code is defined by two digits", and a "QUESTION CODE" dropdown menu. At the bottom of the interface, there are buttons for "SAVE", "CANCEL", "DELETE", "CLOSE", and "MOVE TO".



Headquarters

- **How used**
 - **Define the survey project**—survey staff, sample, and instruments
 - **Manage workload**—assign work to supervisors
 - **Control quality**—review supervisors' work
 - **Manage data export**—output structured data at any point
- **Where to find it**
 - Cloud-hosted server, or
 - Self-hosted server



Headquarters, in images

The screenshot shows the Headquarters interface. The top navigation bar includes 'Headquarters', 'Reports' (highlighted with a red box), 'Interviews', 'Supervisors', 'Questionnaires', and 'Administration'. Below this, the 'Questionnaires' section is visible, featuring a table of questionnaires with columns for 'Title', 'Batch upload', 'New Interview', and 'Export Data'. The 'Export Data' column contains 'CSV' and 'Delete' buttons. A table below the questionnaires shows a row with a checkbox, 'Region:2, Area of residence:Urban, Household address:Harvard St. 9838', 'Peter', '6/25/2014', and 'SupervisorAssigned'.

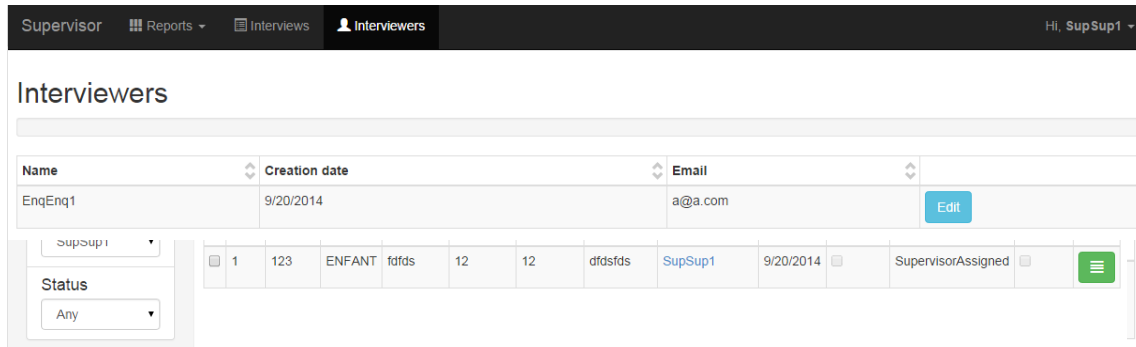
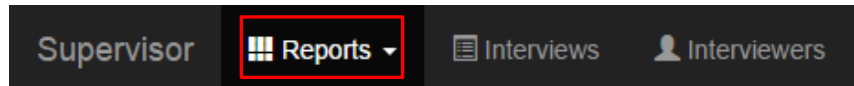


Supervisor

- **How used**
 - **Manage workflow**—assign interviews to interviewers
 - **Control quality**—review interviewers' work, approving or rejecting it
- **Where to find it**
 - Cloud-based (online)
 - Web-based (offline with synchronization to HQ)



Supervisor, in images

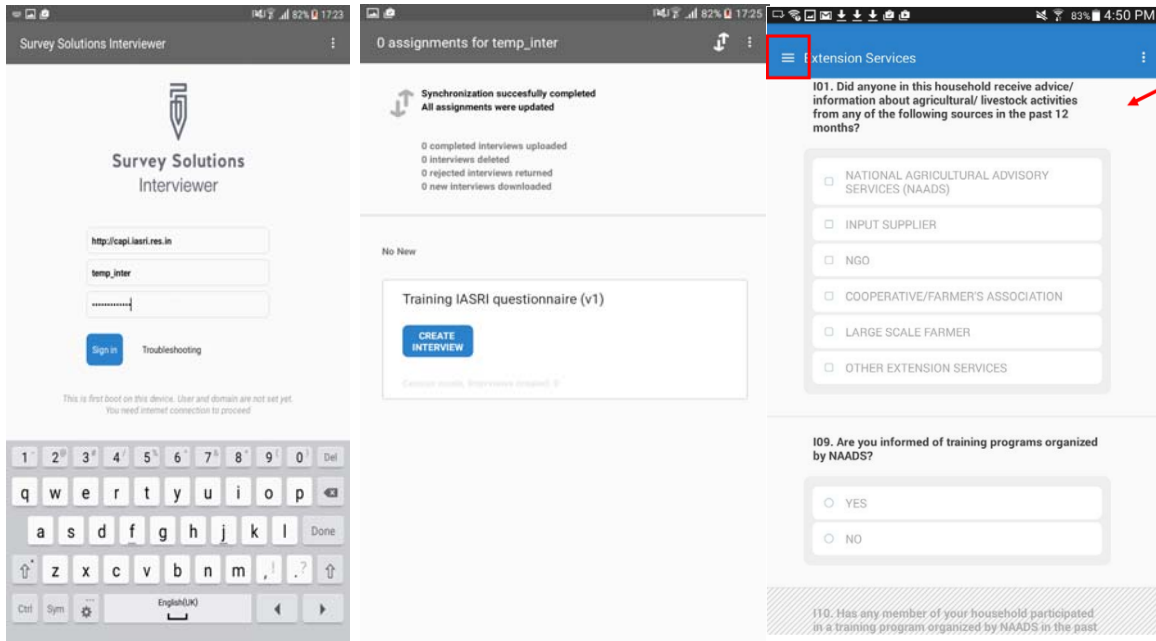


Interviewer

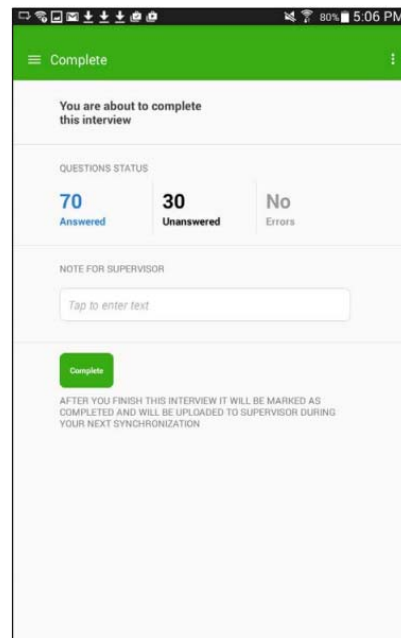
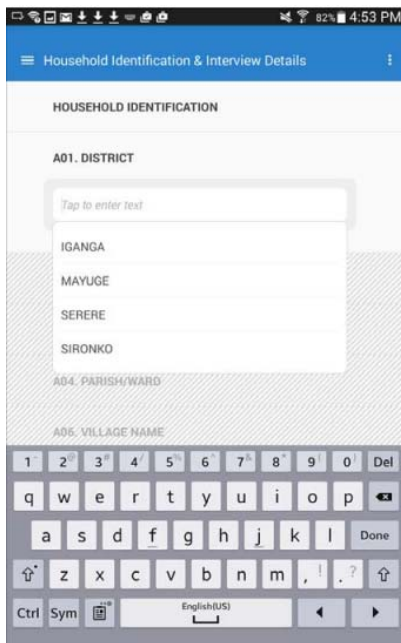
- **How used**
 - **Receive assignments**—new questionnaires, new interviews
 - **Complete assignment**—collect data, module by module
 - **Submit assignment**—confirm all questions are answered, send completed assignment for review
- **Where to find it**
 - Tablet



Interviewer, in images



Interviewer, in more images



Organization of CAPI training

- **Overview -> Interviewer, Supervisor, Designer, and Tester**
- Basic **Designer**
- Intermediate **Designer**
- Case management with **HQ, Supervisor,** completing interviews with **Interviewer.**
- Data export with **HQ** and other tools.

QUESTIONS?