# Overview of Survey Solutions
## System and organization of training

# 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**.

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# What is a "case"?

**Blank Questionnaire**                    *Case*

| 2017 Agricultural Survey | 2017 Agricultural Survey |
|---|---|
| 1. Holder: | 1. Holder: |
| _____ | *Farmer Joe* _____ |
| | |
| 2. Age of holder:          ____ | 2. Age of holder:          ____ |
| 3. Number of plots:     ____ | 3. Number of plots:        ____ |
| . | . |
| . | . |
| . | . |
| . | . |
| . | . |
| . | . |
| n. | n. |

# 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**

  Events recorded

- Data Export  OR  →

# HOW ALL THE PIECES FIT TOGETHER

Researchers design questionnaires using visual tools and upload them to the central server

HQ distributes the ~~~~~~

**Internet**

**Internet**

Supervisors monitor the submissions

Supervisors assign households to individual interviewers

**WiFi**

**WiFi**

Interviewers visit households and collect data

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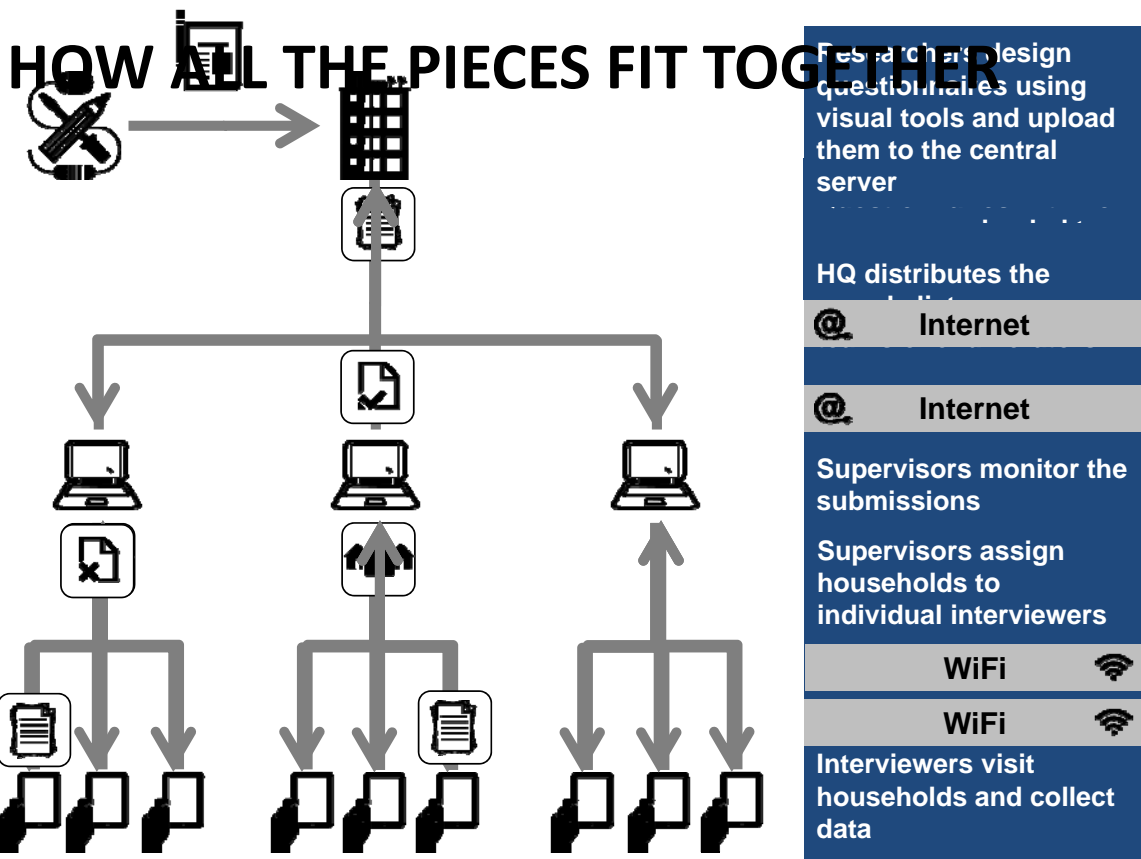
# Brief look at each piece

– 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

# 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
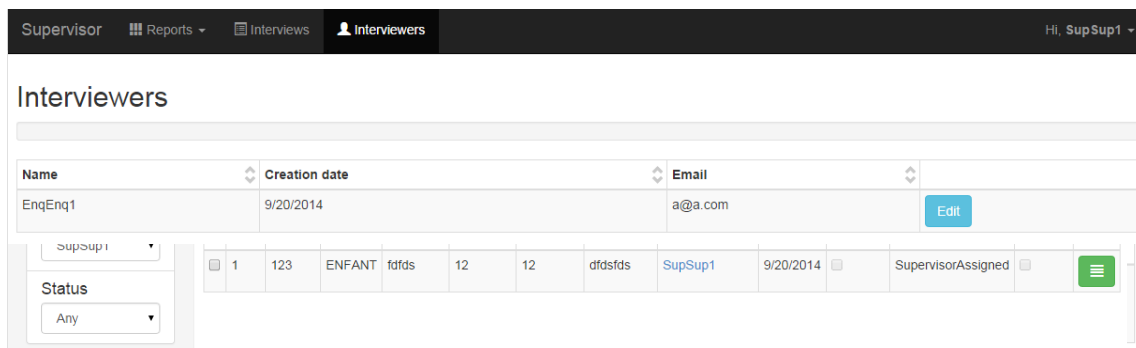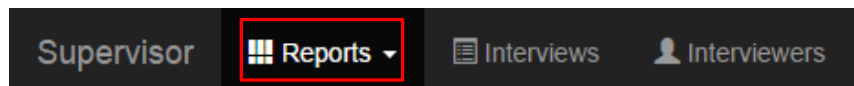
# Headquarters, in images

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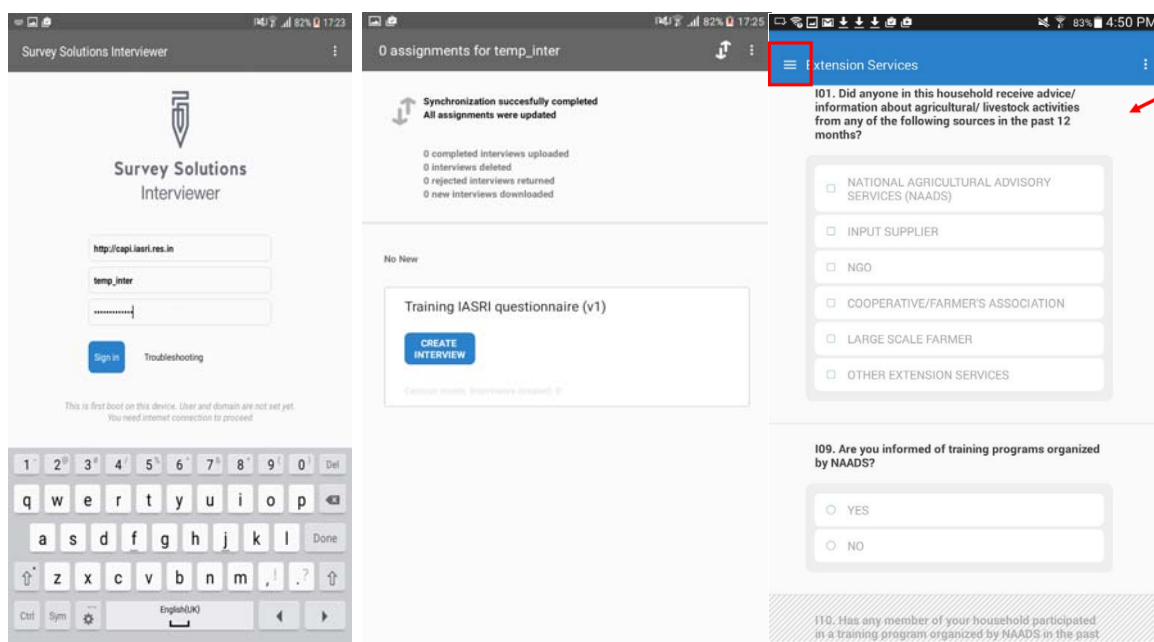  - *Receive assignments*—new questionnaires, new interviews
  - *Complete assignment*—collect data, module by module
  - *Submit assignment*—confirm all questions are answered, send completed assignment for review
- **Where to find it**
  - Tablet

# Interviewer, in images

# Interviewer, in more images





# Organization of training

- Day 1 (Monday) Overview and Getting started with the **Set up -> Designer, and Tester**

- Day 2 (Tuesday): Basic **Designer**

- Day 3 (Wednesday): Intermediate **Designer**

- Day 4 (Thursday): Case management with **HQ**, **Supervisor**, completing interviews with **Interviewer**.

- Day 5 (Friday): Data export with **HQ** and AOB

# QUESTIONS?