www.pmadata.org/stlr

We invite you to use and adapt PMA STLR tools!

Whatever tool you discover and intend to try out, you will *need* to adapt these tools to your context.
This may include:

- ***Changing questionnaire question text*:** Some tools contain questions from our questionnaires (*publicly available here*), along with their numbering. Note that, in some cases, question numbering has changed across phases, but any questions cited in a tool use consistent numbering *within* that tool.
- ***Considering appropriate pronouns:*** We use female pronouns quite often, as PMA worked with female enumerators – *and* as a bonus, we are happy to use a feminine pronoun by default for a change!

TIP: ***Use our hashtag system!***
As we used these tools across various country contexts, we developed a simple system of using hashtags as placeholders for information that will need to be updated based on the country, context, culture, and program.

For example, information in a tool that was country-specific is noted with the hashtag placeholder, *#countryspecific* – or possibly an even more specific placeholder like *#districtlevel* or *#localpartner*.

Information that required a change in date is noted with hashtags such as *#todaysdate* or *#lastyear*.
These hashtags allow those adapting the tool to use the Find&Replace function to quickly identify and update all instances of a hashtag within seconds.

Field Staff Training Material Development HANDBOOK

This handbook is designed to be an aid in the design and implementation of field staff training.

When adopting, adapting, and sharing this tool, please use this suggested citation:

"Field Staff Training Material Development HANDBOOK," created by Selamawit Desta and Dr. Sally Safi for PMA Ethiopia. The William H. Gates Institute for Population and Reproductive Health at The Johns Hopkins Bloomberg School of Public Health. Performance Monitoring for Action Ethiopia (PMA-ET). Released September 2024. CC BY-NC 4.0.

HANDBOOK

for

Field Staff Training Material Development

Performance Monitoring for Action
Ethiopia

PMA
PERFORMANCE MONITORING FOR ACTION
ETHIOPIA

TABLE OF CONTENTS

PMA
PERFORMANCE MONITORING FOR ACTION
ETHIOPIA

Introduction to the Handbook for Field Staff Training Material Development

Objectives of this Handbook

This handbook should be used as an aid in the design and implementation of field staff training. The handbook is meant to serve as both a **learning guide** and an **ongoing capacity-building reference tool** to staff who are tasked with the responsibility of developing, refining, finalizing, and implementing various training materials, including: *training manuals, assessments, agendas, PowerPoint presentations, training activities such as exercises, role plays, group exercises, etc*. As capacity building is a key objective of the PMA Ethiopia project, this handbook, along with in-person and virtual training and guidance, will contribute to the overall capacity-building efforts of the project.

The overall objectives of this handbook are:

1. To support the survey implementation training team to acquire **key competencies** in the development and refinement of training materials expected for a field staff training.
2. To serve as a **resource** for the survey implementation training team to continue to refine skills and train new and additional staff in the modules included in this handbook.
3. To support the **skills transfer** from the HQ team to the country team.
4. To provide a tool for the user of this handbook to **prepare facilitators and supervisors** with skills needed to manage and lead training sessions.

Using this Handbook for both Learning and Reference

This handbook will provide instructions and clear suggestions for how each step developing field staff training materials should be carried out. It should be used both as a learning tool in the months and weeks ahead of any upcoming field staff training *and* continue to be used as a reference tool for you and other staff responsible for leading and/or supporting the development of training materials. There are multiple sections to this handbook, which you can explore with the help of the Table of Contents on the previous page.

Handbook as a Punctual Learning Tool

This handbook is organized in modules. At the end of each module there is an assignment to assess knowledge and skill sets taught during the module.

Your tasks for punctual learning

As an active participant of this exercise and reader of this handbook, you are expected to:

- **Review** each module in detail
- **Refer** to and **read** the many linked resources in the PMA Basket of Tools

Handbook as an Ongoing Learning and Reference Tool

We encourage you to take notes and highlight sections of your handbook as you use it, in order to make it easier to learn from and to reference it going forward. You are welcome to make whatever notes and marks in your paper or electronic copy of this document, and we encourage you to write notes in the margins.

In addition, here are some suggestions on mark-ups that may help you to note and re-reference key information:

Underline: Underline passages that are key to your understanding and your tasks.

Circle: Circle key terms and ideas.

*

Star: Star areas that may be particularly important for you to remember.

!!!! **Exclamation point**: Put an exclamation point next to an area that has information about a crucial warning or frequent error.

Your tasks for ongoing learning

As an active ongoing learner and member of the training team, you are expected to:

- Review each module in detail
- Ask questions frequently
- Refer to and read the many linked resources in the PMA Basket of Tools
- Contribute to the development of training materials for this and other upcoming field staff trainings

Note to STLR users about the "PMA Basket of Tools" & "Facilitation Guide"

Throughout this handbook, we refer to the PMA Basket of Tools, a structured collection of training and learning tools created and curated by PMA.
Some of these tools have been shared on the STLR page of the PMA website.
Other tools are not yet available to the public, so we have unlinked them.
We also refer to the PMA Facilitation Guide, which is not available to the public.

Updating the Handbook

This handbook is intended to establish a standard approach to the development and content of field staff training materials and in turn aid in the rigorous training of field staff so they can collect high-quality data. However, the handbook should be adapted to reflect the evolution and needs of the project in later years.

As users of this handbook, we encourage you to improve and add to the handbook.

Module 1: Navigate and identify training tools in the PMA Basket of Tools

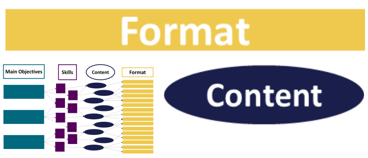
One of the most important tasks that you will have is designing, facilitating, and leading data collector trainings. Such trainings are integral to the success of the team because it is these adequate and appropriate trainings, with a focus on skills and knowledge retention, which allow data collectors to collect high quality, accurate survey data that was obtained in a respectful, culturally sensitive, and ethical fashion. Furthermore, we have a great respect for our data collectors and field supervisors so, through training, we want to set them up for success and empower them to feel comfortable and confident doing this work.

As you begin to design and prepare your training and the related materials, knowing what materials already exist and how to find them will both save you time and allow you to benefit from others' experience and suggestions. Why start building training materials from scratch if there is already something that can be found, adopted, and adapted – or, at the very least, used for information and inspiration!

The *PMA Basket of Tools* is a collection of tools, templates, and guides, all stored in Dropbox, which have been collated to help facilitators successfully plan and execute PMA-related trainings. In this Basket of Tools, you will find templates of previous PowerPoints that can be used for trainings, examples of data collector training manuals and materials, as well as information and resources to help you design effective and engaging trainings for adult learners, notably the data collectors and field supervisors.

This first module will focus on how to navigate and identify tools in the Basket of Tools that can help to improve your facilitation skills, identify and build on existing training tools and resources, and overall maximize the impact and knowledge retention of your trainees. You are not expected to master the entire content of this Basket; however, understanding how to navigate it and the types of tools that it contains will help you in identifying and drawing on these existing materials as you prepare your training.

In Module 3, we will discuss the "Reverse Design" approach to designing a training, which includes steps on defining the Format of the various training sessions and identifying Content to help inform and teach during each of these sessions.



As you learn about and begin to explore the Basket of Tools, remember that this Basket, along with the training manual, will be a main source of ideas and resources for the Content and Format pieces of your Reverse-Design agenda.

<u>Objectives:</u>

1. To understand the scope and breadth of the tools available in the PMA Basket of Tools

2. To understand how to find and identify available tools that could support a training you are preparing

This module includes the following sections:

Section 1.1: Navigating and identifying tools in the Basket

The PMA Basket of Tools is a robust collection of resources. However, the sheer number of training tools means that it can be intimidating to begin exploring or searching for a tool to use. In order to introduce you to the most applicable resources, this module will explain how to navigate the Basket, as well as how to access documents that will be useful for completing other modules in this handbook.

Understanding the Basket's file structure

The Basket of Tools is a collection of training tools that are divided around 10 major themes, each of which has a folder containing documents that are related to that theme. Each theme has a corresponding number series, used to indicate the folder and the tools in each folder in the Dropbox. An additional set of folders, containing tools for certain types of trainings and modules, are designated not with numbers but with letters.

Each tool has a 3- or 4-digit code that indicates both the theme and also whether the tool is "classic", part of the tools created before 2018, or "new", part of the training redesign work begun in 2018. (ID = folder number + 2 more digits). Tools with IDs ending in 00 are explanatory, such as "ReadMe" documents. Tools with IDs 01 through 09 in each series are used for classic tools, and IDs in the 10s, 20s, 30s, etc. are used for new tools.

For example:

"id601 PMATemplate-5.1-Intro to FP Methods" is a *classic* tool presenting the *Female Questionnaire* ; the 600 indicates the theme, and the 01 that it's a classic tool

"id510 Introduction to Household Questionnaire 20180416 FR" is a *new* tool to introduce the *Household Questionnaire*

Tools that are very related or parts of one overall tool will have the same id, followed by a letter distinguishing them from the central tool.

For example: "id083 LEARN about mailmerge" is the main tool and "id083a PaymentLetter_template_EXAMPLE" is a part of the main tool

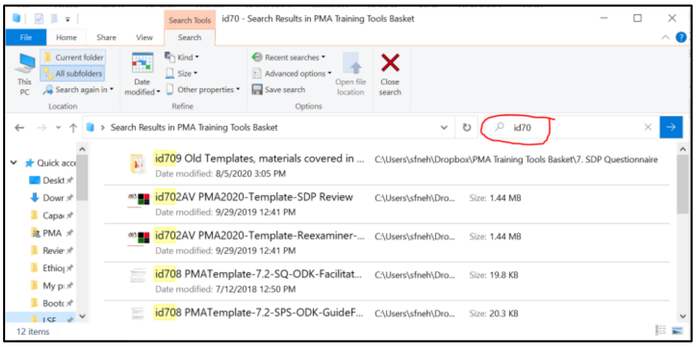
Numbering of tools may not always be consecutive; this is done on purpose, to allow space for the eventual discovery of classic tools that have not yet been added, or for the creation of new tools that may have the same theme. When a new tool is added within the same general theme of a series of tools within a subfolder, it can be given an ID within that not-yet-attributed ID range.

> *For example*: id021 through id025 are all about designing a training. If we create a new tool related to training design, we could attribute it the id026, to keep it grouped with other similar tools within the "00. Training Design, Prep, and Facilitation" folder, without repeating an ID already attributed to another tool.

Identifying useful tools in the Basket

This ID system allows you to go through the different folders to either generally browse the tools, or to search by id for a specific tool or a specific type of tool.

> *For example*: If you're looking for a general tool about the SDP Questionnaire, you could do a search for "id7" which will show all tools with IDs in the 700s, the designation for the SDP Questionnaire. If you're looking specifically for a *classic* tool about the SDP Questionnaire, you could search for "id70" with the third digit not included in the search term so that all classic tools come up in the search results (id701, id702, id703, etc.).



Naming and Finding Basket tools in this Handbook

Throughout the following sections of the handbook, you will have opportunities to explore the Basket and familiarize yourself with the resources it contains. However, it will take time to get used to this classification and labeling scheme. To help you, when we reference a tool in the Basket as part of this handbook, we will refer to the tool by the full name of the document, and also note the sequence of folders needed to access the document.

> *On the rare occasion that only the document name is listed, you can access that document from the main folder of the Basket of Tools, without clicking on any subfolders.*

For example, in Module 2, the Handbook will mention:

> *In PMA Basket of Tools, look at the reference RE manual:*
> ***0. Guides and Questionnaires (verified)→ "id091 PMA RE Guide-RENUM-v1.2.3.docx"***.

Another example: To direct you to an example of the training schedule, we might refer you to:

> **00. Training Design, Prep, and Facilitation (verified) → id028 Agenda examples → "id028aBF PMABF-trainingER-R5-Agenda-v4-2017.10.31-fb"**

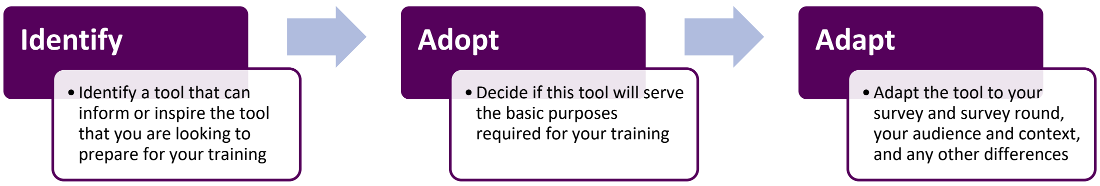
This means that we would like you to access the document titled "*id028aBF PMABF-trainingER-R5-Agenda-v4-2017.10.31-fb*", which can be located by first clicking on the folder "*00. Training Design, Prep and Facilitation (verified)*", then the "*id028 Agenda examples*" subfolder within that, and finally the document itself.

Alternatively, you may simply type in the tool ID in the search bar and hit "enter".

Section 1.2: General advice for using the documents within the Basket

Throughout the remainder of this handbook, we will mention resources contained within the Basket and ask you to use these when completing other tasks such as developing a training agenda, designing a training activity, or learning facilitation skills. It is important to note that **these tools are not meant to be prescriptive, but rather are meant to be resources or guides that you can adapt to your own work if or when you find them helpful**. We will reiterate this fundamental idea many times in the coming sections.

In general, you should be following three steps when consulting the Basket in preparation for your training:



For example: The Basket contains a variety of teaching techniques that can be used in data collector training. You do not have to, nor should you, incorporate every single one of these techniques into a training. Instead, you can select the teaching technique that will best suit the participants of the training and the information that you want them to learn. In the remainder of this handbook, you will have opportunities to practice this skill of identifying, adopting, and adapting with a variety of the training documents.

Remember the Timeline!

As you become familiar with the contents of the Basket, you will begin to realize their utility in the tasks that you complete for this team. It is hard to offer a specific timeline for identifying, adopting, and adapting training tools, given the variety of tasks that you may be completing. However, generally, to avoid re-creating what is already available and potentially missing out on a time-saving tip or tool, you should review the Basket content that relates to the task you are completing during the early planning phases of the task, ideally within the first week of planning. As you review the Basket, make note of the documents that may be useful to you throughout planning and executing your specific task so that you can reference them when applicable.

Apply It to Try It!

Turn to the **Exercise, Module 1** in the ***Exercises*** section at the end of this Handbook for instructions on a familiarization activity, where you will become familiar with the Basket of Tools structure and contents.

Note to STLR users about Module Evaluations

After each Module in this handbook, we have included a few evaluation questions. These are meant to give the learner an opportunity to reflect, and to give feedback to the supervisors leading this learning process on what has and hasn't been effective. We encourage you to maintain these evaluations, adapting them to the reflection and evaluation needs of your team.

EVALUATION of Module 1: Navigating and identifying training tools in the PMA Basket of Tools

1. Are there any questions that you still have about completing this task after completion of this module?
   ____
   ____
   ____
   ____

2. Do you have any suggestions or comments about how we can make this module more useful for you?
   ____
   ____
   ____
   ____

3. Please indicate the degree to which you agree or disagree with the following statements:

	Strongly disagree	Somewhat disagree	Neutral	Somewhat agree	Strongly agree
This module increased my skills and knowledge of navigating and identifying tools in the PMA Basket of Tools.	1	2	3	4	5
I feel this module adequately prepared me to navigate and identify tools in the PMA Basket of Tools.	1	2	3	4	5
I am confident that I now have the skills to navigate and identify tools in the PMA Basket.	1	2	3	4	5

Module 2: Prepare or update survey manuals for field staff

The training of all field staff has a very significant impact on the quality of data collection and survey work as well as on the longer-term capabilities of the team. Training of all field staff and team members on the team is considered one of the most important activities of the project. Therefore, **the quality and content of all the training materials and resources that will be used to inform and train the field team must be clear, comprehensive, and practical**.

This module focuses on developing and updating the data collector's manual. The module does not explicitly focus on a specific training manual, such as a field supervisor or data collector's manual. Instead, it provides a series of "best practices", guidance and tips for how to write content for training manuals.

Oftentimes, you will be working on modifying an existing manual – adding new survey questions and removing or modifying older survey questions and protocols– rather than developing an entirely new manual. The skills and lessons in this document are helpful both in updating existing manuals with new questions or protocols *and* in developing an entirely new training manual.

Remember that the field staff training manual, much like this handbook, has two major purposes:

1. **Real-time learning** – *provide structured content to learn from and review during the training*
2. **Ongoing reference** – *serve as a reference document to review and quickly look up information during data collection*

As you will learn in your review of this module, developing and updating manuals and all other training materials is a collaborative process. As part of the training team, you will be responsible for collaborating with the various teams on the project. **The program manager assigned to lead this work will be responsible for delegating roles and responsibilities for each team member as well as clarifying timelines.** The delegation of roles, using the RACI-D[1] tool (see EXERCISE for Section 6.2), will be discussed among your team members; it will not be covered in this handbook.

Objectives of this module:

1. To develop an outline for components of the data collector manual
2. To develop a process to add the survey questions to the manual
3. To develop descriptors of the survey questions

[1] *RACI-D: Responsible, Accountable, Consulted, Informed-Decider

4. To develop a strategy to finalize the manual

This module includes the following sections:

Section 2.1: Developing a General Outline for the Manual Components

Section 2.2: Developing or Updating Survey Design Protocol Sections

Section 2.3: Adding Survey Questions to the Manual

***Section 2.4: Establishing Team Norms**

Section 2.1: Developing a general outline for the manual components

The first step: develop an outline

To ensure that the field staff training manual will be maximally beneficial to the trainees, it is important to **first develop an outline** to lay out the components that will be included in the manual. Starting with an outline increases the chances that the information will be complete, logically sequenced, and coherent; there will not be unnecessary repetition or conflicting information in various parts, nor will there be key content that is altogether forgotten. Drafting the outline first also allows for multiple people to give their input as to the *overall content and structure* of the manual, without having to write or read through an often-long document.

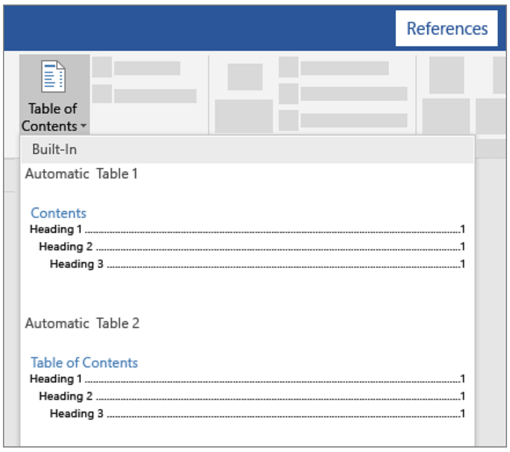
This outline should be **informed by a list of all the skills and knowledge** that you need the user of the manual to possess in order to complete the central task of their role, which most often is administering the survey; the basis for this list of skills and knowledge is the data collector manual itself, starting with its Table of Contents.

Remember to think about the user of the training manual as you make the outline, so that you are tailoring the information to their level of education/training and are including all of the information that the user will need to understand and complete their task. Use previous data collector manuals as a model for your outline, particularly their tables of content which are in themselves manual outlines. Make adaptations for any variable goals of the manual you are developing.

Common manual components

Below are some commonly included components of manuals that might be helpful references when developing your outline:

- ***Table of Contents:*** This manual element includes a list of all the sections that are included in the manual along with the page number where those sections are found. It is an important element because it provides a centralized place where the manual user can find out where specific information they need is located. Consider using a placeholder for the Table of Contents in your outline, as it will be created from the content itself – and in fact, it will likely closely resemble the outline. (*See [this video tutorial](#) or [this written tutorial](#) on how to create a Table of Contents in Word.*)



- ***Contact information**:* Remember to include information that manual users can use to follow up if they need any clarification or have any questions.
- ***Acronyms and terminology**:* This should be included near the beginning of the manual and should include standardized definition for any acronym used in the manual as well as definitions of any terms that are not self-explanatory or are technical in nature and are used repeatedly through the manual (e.g. index birth or postpartum)
- ***Survey design protocol sections**:* These sections will be developed or refined with the PIs, program managers and technical advisors; *see more about this work in [Section 2.2](#)*. They explain field protocol relevant to the field staff, as dictated by survey design.
- ***Use software for managing and administering surveys and additional technology***: This section should explain any basic or changing use of CAPI, ODK, REDCap or other similar software used for mobile data collection. This section also covers any project-approved mobile phone applications that field staff may need to use.
- ***General questionnaire and section introductions**:* These provide brief introductory information and context for the questionnaire or the questionnaire section to follow. These introductions can help users to understand the general flow and content of the questionnaire and its various sections.
- ***Survey questions and response sets, with question-by-question explanations**:* This provides written, and thus standardized, clarity for each question and response set, by pre-empting responses to ambiguous situations, providing highly relevant examples, defining key terms used, and highlighting potentially challenging aspects and opportunities for probing.
- ***Appendix**:* The appendix contains materials that are important but do not quite fit with the flow of the manual. Instead, they are added to the appendix and then referenced in the manual itself. The appendix is a place to:
    - expand on anything that you think might not have been clear in the manual
    - provide any additional materials that can be used for reference later on (e.g. the contraceptive calendar visual aid)
    - include bigger visual aids or lists that would be distracting or inappropriately break-up the manual if they were included within the other sections

Continue taking notes on future improvements!

Often times, it is in using this manual with field staff that you are able to clearly identify areas that need additional updating, clarity, or other improvements in order to serve as the best document for both learning and reference. We recommend that you maintain a central and accessible editable copy of the data collector manual in which team members can comment on these elements during **piloting training**, **data collection field supervision**, **data cleaning**, and other key phases. While the manual needs to be finalized, printed, and distributed before the training and should not require major changes after that point for that particular data collection round, a central collection of these notes can help you to inform and improve the next version of the manual, for the subsequent survey round.

Apply It to Try It!

Turn to the **Exercise, Section 2.1** in the ***Exercises*** section at the end of this Handbook for instructions on an application activity for finding and using the data collector manual's Table of Contents.

Section 2.2: Developing or updating survey design protocol sections

Included in every manual are sections describing, in detail, key survey protocols as they relate to the work required of data collectors, field supervisors, regional coordinators and the leadership team. For us, these protocols include a summary of the study design (cross-sectional and longitudinal), regions where the surveys take place, definitions of when a respondent would be considered lost to follow-up, etc. This section will be drafted or updated in close collaboration with the principal investigators (PIs) on the study to ensure that the content is not only accurate but also understandable by the intended audience: field staff.

For example, the below definition of a compositing toilet uses unclear jargon and technical language.

Composting toilet	A toilet into which excreta and carbon-rich material are combined (vegetable wastes, straw, grass, sawdust, ash) and special conditions maintained to produce inoffensive compost.

While this is a standard definition, it could be improved significantly by including one or multiple pictures of examples of this type of facility in the country's setting to make it clearer. As this is a standard definition, authors of the manual should not change the language; rather they should include a photo and indicate, if possible, regions where these types of facilities are common as well as local terms.

Steps for developing or updating protocol sections of the data collector's manual

1. **Read and understand the protocol**: Use the research proposal and any relevant standard operating procedure documents to develop a clear understanding of all the relevant content. Test your understanding by trying to explain the protocol to a colleague. Note any concepts that are unclear and follow up with the program manager and PIs either immediately or as part of subsequent steps to clarify these concepts.

   When updating existing protocol: You will also need to read previous versions of the manual and identify the specific content that needs to be added, updated, or deleted. Be sure to verify with colleagues on the technical team to ensure that you have a clear understanding of the changes, if any, in survey protocols.

2. **Develop an outline of the protocol sections**: Breakdown the protocol into relevant information and steps for field staff. We suggest you walk through in your mind or with a colleague what it will look like for field staff to follow this protocol in the field, noting the key sections and steps as you go.

   When updating existing protocol: Consider whether it is possible to edit the existing protocol sections to incorporate changes, or if it may be more coherent to re-draft certain sections.

3. **Draft the section text**: Draft the manual section in a way that communicates this content simply and clearly to the field staff. Refer to older versions of the manual for examples of appropriate writing style, content, and level of detail.

   When updating existing protocol: Whether editing existing text or redrafting the section, use the existing protocol text as a checklist, to ensure that all necessary and still-relevant information from this text is incorporated into the newly drafted text.

4. **Share the draft with PIs**: Share the drafted text with the PIs for input and edits.
5. **Finalize text**: Based on PIs' input and edits, finalize the text, following up with PIs and other editors when comments or edited text are unclear.
6. **Test for comprehension**: Sometimes, with multiple editors and multiple drafting rounds, a text can lack coherence, flow, or standardized language. Additionally, editors may likely have different backgrounds and writing styles, but their resulting text must be easily understood by field staff. Ensure that the final text is comprehensible by rereading it and asking a colleague less involved in drafting it to read it as well. Consider also asking one or two data collectors to read the protocol section and give a summary of their understanding of the protocol based on the text they read, as well as feedback on information that was unclear and wording that was particularly helpful or confusing.

Remember the Timeline!

Many of these protocol drafting steps will be done collaboratively with colleagues, so work with the writing team to (1) organize who will be responsible for the different sections and changes, and (2) develop a timeline for each phase of the work.

We suggest the following timeline, which is based on the timing of the data collector training.

1. ***At least 8 weeks before data collector's training* = gather and understand protocol information**
   Follow up with PIs on the changes to the protocol. Ask for the updated research proposal, review and compile and send questions you have about changes. Allow the leadership team at least <u>three weeks</u> for this process.

2. ***At least 6 weeks before data collector's training* = draft/edit protocol section in data collector's manual**
   Develop the draft, incorporating all of the needed changes including removing content that does not apply to updated study protocol. Depending on the level of needed changes the timeline for this work will vary. Please allow the writing team at least <u>three weeks</u> to write, edit and have PIs review and approve the content changes.

3. ***At least 5 weeks before data collector's training:* Translation team should dedicate time to translating the manual.** Typically this process has taken about a month, but this is dependent on the amount of content that will need translation.

4. ***At least 2 weeks before data collector's training:* Finalize data collector's manual and begin to print**

Apply It to Try It!

Turn to the <u>**Exercise, Section 2.2**</u> in the ***Exercises*** section at the end of this Handbook for instructions on an application activity for practicing the process of updating survey design protocol sections. If you follow the submission instructions for this exercise, you will also receive feedback on your work.

Section 2.3: Adding survey questions to the manual

One of the main sections in the manual is the list of all the survey questions and response sets in table format.

Standardizing questions and choice options formats

In order to maximize the utility of this table for the trainees, to help them both understand it and easily reference it, it is essential to **use a standardized way by which the survey questions and choice options are included in the table**. You want the numbering, questions, and option choices to be included in the same way, in the same place, for each of the questions.

Below is an example of how to include each element in the table:

Question number: Question text? *Question hint* ● Response option 1 ● Response option 2 ● Response option 3 ● Response option 4	**DESCRIPTION TITLE** Description of the question

Remember to **bold elements** to make them stand out or use ALL CAPS FONT, but be sure to do this in a standardized fashion; for example, often every question text is typed in bold.

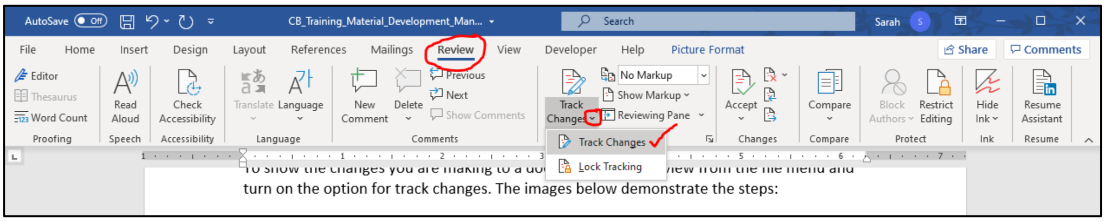
Tracking changes while updating the manual

The questionnaires might be updated by the research team while the team is working on the manual. In order to make sure that you are effectively using preparation time and can complete the manual in time for the training, it will be necessary to input the questionnaire questions using the most recent version available when you begin drafting or updating the manual, and then update these questions in batches as newer versions of the questionnaire become available. Often the questionnaire is saved in Microsoft Word with a feature called 'tracked changes*' which highlights the changes that were made in a different color of text, allowing you to find the change more quickly when updating the manual. Although this updating method is useful, do not rely solely on the "tracked changes" feature; periodically and before finalizing the manual, also read carefully through each question to ensure that the manual matches the most recent version of the questionnaire.

How to use the "Track-Changes" features?

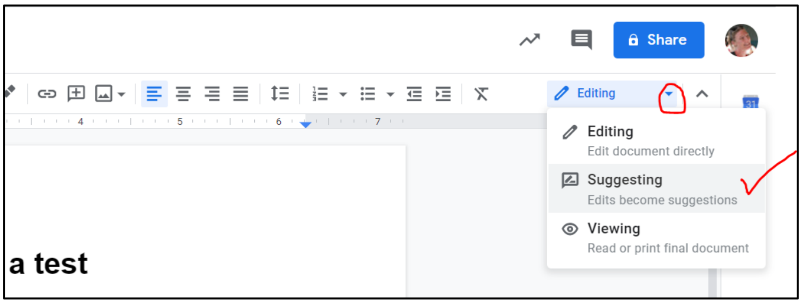
In **Microsoft Word**

To show the changes you are making to a document, select Review from the file menu and turn on the option for track changes.

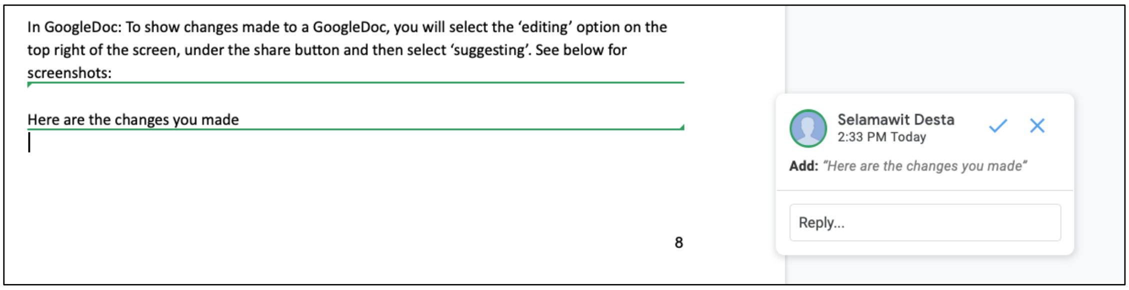


In **Google Docs:**

To show the changes you are making to a document, select the "Editing" option on the top right of the screen, and then select "Suggesting".



The tracked changes you make in Google Docs will have green lines above and below.



Developing descriptors of the survey questions

Uncertainty and ambiguity around questions and response options are both frustrating for the field staff and can affect data quality negatively! Within the manual, each of the survey questions should have a description that brings certainty and clarity to each question-and-answer choice option. This is <u>one of the most critical elements of developing the manual</u> as it provides the trainee with essential information that they need to complete their task of administering the survey.

Each of the survey questions should generally include the following:

- *A brief explanation of the **purpose** of the question*
- *An explanation of exactly what the question is **asking** (What information does the question want the data collector to gather from the respondent?)*
- *An explanation of any **terms or phrases** that are not self-explanatory*
- *A definition of each of the **answer choices** that might not otherwise be clear*
- *Clarification of any elements that you expect to be **confusing** to the respondent, and suggestions for helpful **probes and examples***
- *Details about the **flow of questions** (for example if a question is repeated, or only asked to a specific respondent, or very closely resembles another question, etc.)*

The **<u>description should NOT restate the question</u>**. Instead, it should contain key messages you think are important for the data collector to know about each question as well as each answer option.

For example:

Question: "What is the main source of drinking water for this household?"

Poor description: This question asks about the main drinking water source for the household.

Stronger description: This question is important because [include short description based on the rationale for adding the question]… If the household has multiple sources of drinking water, the data collector should determine the main one by … For households that may be very poor and/or live in a region affected by drought and feel the question is insensitive, consider [include tips that are culturally and socially applicable for the country/region]… when asking this question.

As you are writing and reviewing the questionnaire descriptions, remember to tailor your descriptions to:

(1) ***The level of education and baseline knowledge of your trainees*** - Try to predict any elements that might be confusing and provide extra detail/description for these questions.

When reviewing the description, ask yourself:

- Is there anything that the data collector would not understand about this survey question? Is anything unclear?
- After reading the explanation of the question, could a data collector explain this question to a survey respondent?

(2) ***Challenges they may face in the field*** - Think about the various situations that a data collector or field supervisor might encounter when they are asking each question. For example, if the question asks what a child ate the previous day, it might be important to consider what the data collector should do if the mother wasn't the only one feeding the child/wasn't with the child yesterday. Try to plan for each of those scenarios and tell the data collector how to move forward. This will ensure survey respondents are able to answer in a standardized way because you told the data collector what to do in each scenario.

When reviewing the description, ask yourself:

- Are there any situations that data collectors might encounter when asking this question that I didn't account for?
- Did I provide an explanation for what the data collector should do in each of the likely scenarios?

Good example

P6M3: Now I would like to ask you about food that [NAME] had yesterday during the day or at night. I am interested in whether your child had the items I mention even if it was combined with other food* • [Option 1] • [Option 2] • …	**DIETARY RECALL FOR CHILD** This question asks about specific liquids or semi solid and solid foods the child ate or drank YESTERDAY during both the day and the night. **<u>This period of time refers to the time the child woke up yesterday morning to the time the child woke up today, including any drinks or food consumed overnight</u>.** Ask about each of the items in the order they appear in the question. Be careful to record the response ("YES," "NO", Don't know, no response) for an item before asking about the next item. If a child consumed a mixed dish, it should be clear to the respondent to say "yes" to any of the foods asked about that are ingredients in that dish. For example, if the child had injera with lentils and carrots you must select the options 'injera, bread, rice..' ***and*** 'pumpkin, carrots, squash….' and probe to find out if other foods were included (e.g. potatoes).

	Sometimes, the mother is not the only person to feed the child. If other members of the household or a caretaker helped feed the child, it may be difficult for the mother to answer this question. Or, if the mother was not with the child on the day before you conduct the interview, she may not be able to answer this question at all. If this situation occurs, ask the mother to consult the person who was responsible for the child's care while the mother was away about what the child drank. You may also talk to the other person directly about this question, if the mother gives you permission

Why is this a good example?

- Clarifies the time period the question is referring to
- Provides information and helpful examples of how to record food groups/item
- Provides helpful notes to the data collector on who they can ask these questions to

Can you think of other reasons that this is a good example?

Note: ***Length does not make a description better; what you need to remember is how clear the description's content is to the main audience.***

Not a good example

P6M3: Now I would like to ask you about food that [NAME] had yesterday during the day or at night. I am interested in whether your child had the items I mention even if it was combined with other food* • [Option 1] • [Option 2]	**DIETARY RECALL FOR CHILD** This question asks the mother what she thinks the infant ate.

Why is this <u>NOT</u> a good example?

- Simply restates the question
- Does not provide any helpful direction or additional guidance to the data collector. The description is missing very important details needed. For example, what if the mother has a nanny and therefore does not know everything that the child ate?
- This does not give data collector tips on how to approach the respondent, how to probe to ensure she is capturing all foods, including snacks, eaten by the child.

Can you think of other reasons that this is <u>not</u> a good example?

Finalizing the manual

When you have completed drafting and/or updating the manual, there are a couple of final tasks to complete before printing the manual:

- ***Read through the entire manual****:* Look for typos and grammatical errors, and perform an automatic MS Word spellcheck in the language in which the manual will ultimately be used.
- ***Standardize the formatting of the manual****:* Similar to when you develop the survey question table, ensure that all elements of the manual are formatted the same. For example, all the section headings should be in the same size, color, and font. If you decide to bold one title, then all other titles should be bolded as well. (*See this YouTube tutorial on creating and changing the formatting of section headers.*)
- ***Re-read the manual for any missing or unclear information****:* Read the manual again as if you were the trainee. Think about any outstanding questions that you might have and try to identify if anything wasn't incredibly clear. Imagine what might be a source of contention or confusion during a training presentation or quiz. Be critical and make changes as needed.
- ***Ask the PIs to review****:* It is always helpful to have another set of eyes look at your work. Plus, the research team might have updates that need to be included. Before you print, submit the finalized version to the research team leaders to review.

Remember the Timeline!

It is very hard to know in advance how much content will need to be updated in the manual, so providing a timeline for when this work should be completed can be challenging.

That said, whenever you are completing this task, we suggest the following timeline, which is based on the timing of the data collector training.

1. ***At least 3.5 months before the data collector training*** **= Identify what needs to be updated**

   Review the 'final' paper questionnaires and identify the content that is new/modified since the previous version of the manual. Start the task of outlining the draft manual. This work should take no longer than one week from when you receive the final questionnaires.

2. ***At least 3.25 months before the data collector training*** **= Plan for and start writing content, drafting and editing**

   Divide work of updating the manual with clear timelines among the group responsible for writing content. The team should allow, depending on the level of changes, at least one and half months to write, have the PIs review and finalize content.

3. ***At least 1.75 months before the data collector training*** **= Refine based on pilot**

   If there is a pilot training, writers must use this opportunity to refine the draft manual. Pilot training typically takes one week and incorporating all the changes from the pilot into the manual should take no longer than two weeks. These changes typically include modifications to the question-and-answer option wording. Changes can also include dropped and new answer options. Those responsible for leading the process of finalizing the questionnaire during the pilot must communicate clearly with all other teams - manual writers, data management, and translation teams about changes.

4. ***At least 1.25 month before the data collector training* = Finalize for translation**
   Depending on the level of changes, the timeline for this activity may vary. However, writers of the manual must allow at least ONE month for the translation teams to work on translations.

5. ***At least 2 weeks before the data collector training:* Finalize *data collector's* manual and begin to print**

Apply It to Try It!

Turn to the **Exercise, Section 2.3** in the ***Exercises*** section at the end of this Handbook for instructions on an application activity for practicing the process of adding and updating survey questions and response sets in the manual. If you follow the submission instructions for this exercise, you will also receive feedback on your work.

*Section 2.4: Establishing Team Norms

** While not directly related to creating the data collector manual, the establishment of team norms may easily be integrated into this step in the general process of preparing a data collector training.*

Writing and editing the data collector manual may be the first of many collaborative tasks that your team undertakes in preparation for the data collector trainings. This is a great time, then, to establish or renew team norms for collaboration, to ensure that the subsequent collaboration is smooth, effective, and efficient.

Team norms are important to encourage cohesive team structure and prevent future conflict should challenging situations arise. Establishing norms can be as simple as generating a list of the things that the team needs from each member and that each member needs from the team in order to successfully move forward. Once this list is established, everyone should agree to the norms. These norms can support the process of assigning roles and timelines, checking in on them, and shifting work and dates as necessary.

Norms might include a process for handling conflict among the team members, such as disagreements in the format of the training. There also should be a discussion of what the team will do to ensure accountability of members, such as what will happen if a member cannot meet an agreed upon deadline. Norms are not meant to be punitive in nature, but rather establish an agreed upon respectful course of action should various situations arise and to provide options for effectively avoiding certain situations as well. Norms can be positive as well, such as agreeing to ask a colleague for help before a deadline is missed, or ending every meeting with team members listing one thing that went well.

What happens when norms are too strict? Too lax?

Remember to ensure that your norms are strict enough to be helpful and loose enough to be adaptable. Norms that are too strict can create stress, a dictatorial feeling, and a focus that is too heavily on the process than on the content. Norms that are too lose can lead to lost time and attention, a feeling of lacking community and group efforts, and a loss of efficiency.

Enforcing and adapting group norms

Part of the usefulness of norms comes from some type of enforcement of them. Who is in charge of making sure we follow these norms? What happens when a norm is violated – what are the possible sanctions? Who will reinforce norm violations and sanctions?

The sanctions identified should be compelling enough to make violating a norm less attractive. They should not be so strong as to significantly inconvenience or embarrass someone. They should not be too distracting or time-consuming.

Encourage the team to designate someone to enforce these norms and adopt a language that any team member can use to bring up the violation of norms in a useful, non-confrontational way. Encourage, too, that team members can bring up for discussion a norm that seems to be too strict, too lax, or no longer serving the purpose of helping the team have smooth, effective, and efficient collaboration. Modify the norms as necessary so they continue to serve the team!

Apply It to Try It!

Turn to the **Exercise, Section 2.4** in the ***Exercises*** section at the end of this Handbook for instructions on an application activity for brainstorming and establishing group norms. If you follow the submission instructions for this exercise, you will also receive feedback on your work.

EVALUATION of Module 2: Prepare or update survey manuals for field staff

1. What questions do you still have about preparing and updating survey manuals for field staff?

   ____
   ____
   ____
   ____

2. Do you have any suggestions or comments about how we can make this module more useful for you?

   ____
   ____
   ____
   ____

3. Please indicate the degree to which you agree or disagree with the following statements:

	Strongly disagree	Somewhat disagree	Neutral	Somewhat agree	Strongly agree
This module increased my skills and knowledge of preparing and updating survey manuals for field staff.	1	2	3	4	5
I feel this module adequately prepared me to prepare and update survey manuals for field staff.	1	2	3	4	5
I am confident that I now have the skills to prepare and update survey manuals for field staff.	1	2	3	4	5

Module 3: "Reverse design" to begin developing a training agenda

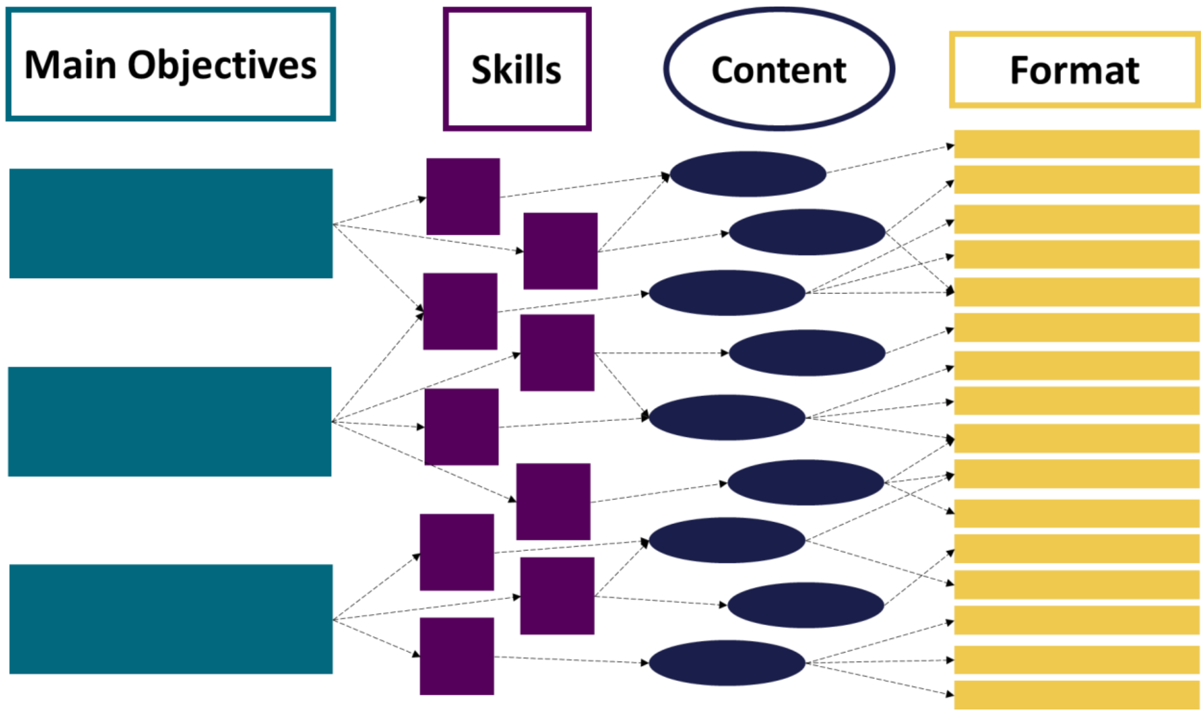
This module will help you start developing training agendas for PMA-related training, by using the "Reverse Design" approach.

About the Reverse Design approach

Each training has a limited amount of time to teach a large amount of content that builds on itself. It will almost always feel like you do not have enough time during your training to thoroughly address everything! Thus, a clear understanding of what to prioritize and how best to teach it will be key to making the best use of the time you have in preparing your trainees as fully as possible.

The Reverse Design approach is a way to clearly and intentionally reflect on content areas and which ones should be prioritized as well as teaching methods you should consider as you design your training agenda. It is called "reverse" because it moves backwards from Main Objectives to Format, which is basically the various training sessions that you will prepare and facilitate. In a Reverse Design approach, you identify:

1st. **Main Objectives** for the training
2nd. **Skills** you would like to target, based on these Main Objectives
3rd. **Content** you can use to provide information about these Skills
4th. **Format** in which to best teach these Skills using the identified Content



We will walk you through these 4 Reverse Design elements in the coming modules in this Handbook.

Objectives:

1. To develop strong main Objectives for your training
2. To list and prioritize Skills to teach during training
3. To start applying the Reverse Design approach to designing a strong training agenda

This module includes the following sections:

Section 3.1: Developing Main Objectives

Designing clear Objectives

It is extremely important to begin your Reverse Design process by first defining strong objectives. Weak objectives will make the rest of the agenda development process more challenging and less likely to best prepare your trainees for their roles!

Learning objectives are simply a statement of what you would like the learner to be able to do or know at the end of a training session. To develop objectives, try following these 3 steps:

Step 1: Begin your objective with the phrase: "By the end of this training session/activity/program, participants will be able to …"

Step 2: Add an **ACTION VERB** to communicate the action that learners will be able to perform.

Try to pick verbs that can be measured or observed. Avoid words like "learn" or "understand" as they cannot be measured or observed, so you will struggle to know if your objective was met.

Step 3: Finish by ***adding details*** about what the learner will do to demonstrate their mastery of the objective; this is the concrete application skill that the learner will gain from the session.

<u>*Example*</u>: In the context of new data collector training, we might have a session where the goal is to teach the data collector how to use the CAPI/ODK/REDCap, or similar software, the open-source software used to collect data using the PMA platform. To develop objectives following the steps above, we might come up with the following objectives:

** Note: The colors below correspond to the steps above*

1. By the end of this training session/activity/program, participants will be able to **DEMONSTRATE** ***their use of the CAPI***/ODK/REDCap, or similar ***software to be able to administer the survey.***

PMA PERFORMANCE MONITORING FOR ACTION ETHIOPIA

2. By the end of this training session/activity/program, participants will be able to **TROUBLESHOOT** ***potential problems with the software*** *and* ***identify who to contact if they should experience a problem with the software that they can't solve.***

We know that these objectives are *specific and clear* because we can tell what we want the learners to be able to do by the end of the training. We know that these objectives are *strongly relevant* because they relate directly to the skills that we need data collectors to possess to successfully complete their roles.

Identifying Main Objectives

Given the complexity, diversity, and integrated nature of the tasks that are needed for data collectors to effectively do their work, there may be a large number of objectives for the training. It is therefore helpful to think about first listing all of the learning objectives that you consider to be important, and then regrouping these into 2-5 "Main Objectives" that summarize them.

Section 3.2: Listing, Ordering, and Prioritizing targeted Skills

Listing targeted Skills

From here, you will list the targeted "Skills" that you would like to build or reinforce during the training. Each of these Skills should be tied to at least one of the Main Objectives.

Oftentimes, your previous work of developing a content outline for the data collector's manual will be very helpful! Return to that central question when developing this list of targeted Skills:

> **What are the Skills that the training participant will need to possess in order to complete the central task(s) of their role?**

Ordering and Prioritizing Skills

Once you have your list of Skills, it is time to begin ordering and prioritizing them.

Step 1: List the Skills in the sequence you should teach them - What makes sense to teach sooner versus later in the day?

For example, it would not make sense to teach new data collectors about the software before you established their roles within PMA and the nature of population-based survey research. As you develop this list, ask yourself, "*What do the participants need to know before they can meet this objective?"* This will help maximize the use of your time by minimizing repetition and by building skills throughout the training.

Step 2: Estimate the approximate amount of training time you should spend on each Skill - What Skill needs more time, because it is complicated and/or crucial to understanding? What Skill is secondary, or simple, or only merits a quick review?

Create a rough guide of how much time you think you might need to meet this objective. It is crucial to think about your participants, their strengths and potential weaknesses, and what their past work (if not a very first training) has shown about what they understand and where they face challenges.

Skills that require using a new or foreign technology, such as ODK, or those that require participants to do something out of their comfort zone, such as discussing sensitive topics in the survey, might take more time to teach and to practice, so plan accordingly for this extra time.

Step 3: Add up the total time and adjust accordingly – Does the time estimated for all Skills fit within your allotted training time?

You'll first need to calculate the total time you have available for this training. Please try to limit your training days to reasonable hours, usually no earlier than 8am or 9am and no later than 5pm or 6pm.

Then, add up the total time estimated for all of your Skills. Will it fit within 70-80% of your allocated training time?

Why only 80%?: You should reserve at least 20% of your total training time for:

- breaks and meals
- transitions between sessions, and sessions that run long
- post-session question-and-answer periods and debriefing time
- additional sessions that are deemed necessary during the training
- sessions that are not specific to a targeted Skill but are still necessary

  For example: Trainings should begin with an introduction of the facilitation team members and an overview of how the day will run and what learners should expect, in order to orient training participants.

If you have gone over time: Return to the list of Skills and their allotted time. Are there any Skills that are redundant or unnecessary? Is there any set of Skills that could reasonably be taught together, and take less time?

Take the time necessary to discuss and finalize this step.

Time management and prioritization are key to developing a useful agenda.

Section 3.3: Beginning to draft the agenda

A first draft of your agenda

You've clarified your Main Objectives and began sequencing and prioritizing your targeted Skills, based on the total time available for your training. This is a big step toward developing an agenda.

An agenda is a time-bound list of training sessions, each of which leverages Content and is taught using an identified Format, that together make up the training schedule. Starting the training design process with the development of an agenda will help you determine the best way to use your time to address each Main Objective and its related Skills, which will help later with designing the training materials for sessions.

Continuing to develop your agenda

As you continue developing your agenda, you'll note that the "Reverse Design" process can begin to seem a little messy. Skills can often be included in multiple sessions, to reinforce learning and help integrate the Skills that build off one another, but every Skill should be included in the agenda at least once. Main Objectives can overlap in certain sessions as well, but every Main Objective should be addressed by at least a few sessions. If a Main Objective is only addressed by one or two sessions, it may not be a Main Objective!

You can come back and modify this early-draft agenda as the development process continues, but the above steps will serve as a rough guide to make sure you are including all Main Objectives and all Skills.

Agenda templates

A master template that can be altered for your agenda planning can be found within the Basket of Tools.

This document is not meant to be a suggestion of the content for your agenda, but rather can serve as an example of how to format your agenda and what information might be helpful to include as you plan. This information includes start and end times, the total time, session titles, session contents, facilitator, materials to be developed, and any notes. It gives a level of detail meant for facilitators in the planning and facilitation stages, which can then be simplified to produce an agenda version to be printed for participants.

What about the Content and Format parts of the Reverse Design approach?

Module 1 discussed the training manuals, which will be key sources for "Content" to support your training.

The rest of this handbook describes how to create or identify additional **Content** (*sources of information about these skills, e.g. a section of the manual or a job aid*), and then how to decide on the **Format** (*how to best teach these Skills using the identified Content, e.g. a quiz or a role-playing activity*). Together, these steps will help you to design and prepare to facilitate a strong training.

Apply It to Try It!

Turn to the **Exercise, Module 3** in the ***Exercises*** section at the end of this Handbook for instructions on an application activity for beginning to develop a training agenda. This is the first in a series of exercises that will walk you through building out the training agenda. If you follow the submission instructions for this exercise, you will also receive feedback on your work.

EVALUATION of Module 3: "Reverse Design" to begin developing a training agenda

1. Are there any questions that you still have about using the "Reverse Design" approach to begin developing a training agenda, after completion of this module?
   ____
   ____
   ____
   ____

2. Do you have any suggestions or comments about how we can make this module more useful for you?
   ____
   ____
   ____
   ____

3. Please indicate the degree to which you agree or disagree with the following statements:

	Strongly disagree	Somewhat disagree	Neutral	Somewhat agree	Strongly agree
This module increased my skills and knowledge of how to begin developing a training agenda.	1	2	3	4	5
I feel this module adequately prepared me to begin developing training agendas.	1	2	3	4	5
I am confident that I now have the skills to begin developing a training agenda.	1	2	3	4	5

Module 4: Prepare training assessments to measure and improve training effectiveness

Why assessments?

Administering assessments to the trainees is useful for several reasons. In general, assessments can serve as a teaching tool to motivate trainees to study the material. More specifically, assessments can help trainers understand trainees' level of comprehension:

- In order to identify areas/topics to continue to emphasize <u>during</u> the training; called "*formative assessments*", as they help us to form our training to respond to these gaps
- In order to understand trainees' level of comprehension and potential issues for their fieldwork <u>at the end</u> of the training; called "*summative assessments*", as they sum up what the trainees have learned

As a general rule, the assessments should not be too complicated but should challenge trainees to ensure, as best as possible, that they have a solid understanding of the survey protocol and the questionnaires, and that they understand complex elements with ease. In general, when creating content for assessments, trainers should focus on the below elements:

- What basic and fundamental information do all data collectors need to know?
- What information has proven to be challenging for data collectors to understand or to apply in the past?
- What new information might be somewhat tricky or a little complex for data collectors to understand or apply?

Learning from "formative assessments"

You should be recording assessment scores and reviewing them for patterns in order to identify what or who might need additional support or review:

- **Very poor results on a specific assessment** might mean that the assessment is too hard or that the content being tested is not understood very well by the majority and needs to be reviewed in detail. Very high results on a specific assessment might mean that the assessment is too easy or that the content being tested is fully mastered by data collectors and so should not take up any additional time during the training.
- **Very poor results on a specific question** might indicate that the question is unclear or that the related content is not understood or may not have even been covered. To understand whether the issue lies with the assessment question or the content, ask data collectors to explain what they understood the question to mean and why they selected the wrong answer they did.
- **Very poor results by an individual** *<u>might</u>* mean that they are not understanding the content being tested. Consider what additional support might be provided to them: a practice test, time reviewing content with an experienced data collector, suggestions of pages to reread in the data collector's manual, etc.

Acting on "summative assessments"

Keep records of these test scores, both individual and group-based tests and also performance on practice interviews, since it is helpful and sometimes necessary to have objective criteria on which to base the dismissal of candidates. That said, keep in mind that assessments are not always a good measure of trainees' abilities. They can be somewhat arbitrary or subject to the individual's comfort level with the predominant language used in the training, or even their comfort and stress level with taking formal assessments.

Ultimately, decisions on retaining or hiring data collectors and supervisors should be based not only on their assessment scores but also on your observations of the trainees' performance during class sessions and field practice.

Step 1: Deciding what to assess and why

When preparing an assessment for a training, the preliminary step is to decide on two main items:

- what general content and areas you want to test the trainees on; *you do not need to build out every question for this initial step, especially as question format will be influenced by the assessment type you choose (*ODK/REDCap/CAPI etc. *, paper, individual or group etc.)*
- what you are, the training team, hoping to learn about the trainees from this assessment; *do you want to monitor ongoing learning i.e. see how they are doing at different stages of the training or do you want to evaluate overall learning (e.g. final exam). Will you need to adapt the training agenda to respond to areas that need more support? Are you looking to make a final decision about whether to retain or hire certain weaker-performing data collectors?*

Step 2: Identifying the assessment type

Once you know generally what you want to assess and to what end, it's time for the second step:

Identify the assessment type, timing, and format

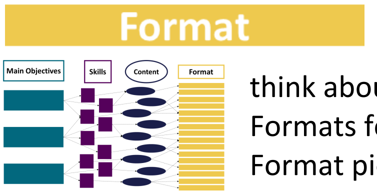
There are four types of standard assessments at a PMA training:

#1. **Phone-based pre-test**	**#2.** **Other Phone-based assessments,** *such as quizzes and final exams*	**#3.** **Paper-based small group assessments**	**#4.** **Practice interviews,** *in one of two formats*: • Mock interviews in class with other data collectors • Practice field interviews with respondents

Your decision of which type of assessment to be used will ideally be based on the best tool for assessing what you want to assess, and what you want to learn from that assessment, at that specific moment in the training. Realistically, your choice may also be influenced by the time and resources available to prepare the assessment. For example, a CAPI/ODK/REDCap-based assessment will require time to program, translate, test, and upload, and may need the help of a programmer, while a paper-based assessment is easier to manage.

Once you decide on the assessment type, timing, and format, there are a number of steps to complete in preparation. These steps, which vary slightly depending on the assessment type, are described in detail in the sections below.

This module will share best practices in developing training assessments and will give you an opportunity to practice this skill through some exercises involving developing quiz questions.



As you learn about and begin to prepare training assessment, think about where different types of assessments may be appropriate Formats for teaching your targeted Skills, thus providing additional Format pieces for your Reverse-Design agenda.

Objectives:

1. Determine the key knowledge and skills that you would like the trainees to take away from the training
2. Design quizzes to test the participants understanding
3. Identify useful tools from the PMA Basket of Tools that can help with developing quizzes and other resources on assessing knowledge of trainees.
4. Have a strong understanding of the types of assessments included in trainings and be able to draft these assessments

This module includes the following sections:

Section 4.1: Developing Phone/Tablet-based pre-test (*formative assessment*)

Type: Quiz, to be taken by individual trainees
Timing: Pretest (before training starts)
Format: Phone/Tablet
Primary aim: Gauge the level of knowledge and skills of the training participants before the training starts

This test allows trainers to identify the information they have been able to retain since the most recent training so that they can use the information to emphasize important issues for the class to review.

For example, questions where the group collectively did not perform well should be addressed as a group, and the related content reviewed again, and possibly in another format or with more practical activities.

Steps to developing a pre-test:

1. **Develop a detailed list of content to pre-test**: Communicate with the data management and field staff team (supervisors and regional coordinators) and compile a list of areas, survey questions, content, and protocol that the data collectors had difficulty with during the previous round.
   For example, in past years we have found that listing and mapping of households can be challenging to data collectors.

   As someone responsible for developing assessments, you must find out more details about what exactly the data collectors found challenging and develop a quiz to help clarify the confusion/difficulty. As you are working on a team, it may be easiest if you designate a person to be responsible for reaching out to the different teams.

2. **Draft quiz questions**: Once you have compiled a comprehensive list of content, work as a team to formulate questions you want to include and their corresponding answer options. Draft the quiz questions in a Word document, and don't worry about formatting for the Phone/Tablet-based software; this step is about identifying and formulating quality questions and clear answer options.
   - ***Reuse past quiz content?***: Typically for pre-test quizzes, we have tended to reuse the final exam from the most recent training. We have found that this is a good way to assess the level of understanding of the data collectors on key survey protocols and features of the platform/data collection. Make sure you remove any questions that do not apply to current questionnaires and survey protocols.

     For example, in the previous round we may have asked about time to collect water and there was a question on the final about that, but that specific question was dropped for this round. Therefore, you must modify this question to ask something different or drop it all together.

   - ***No open-ended questions***: Remember that questions in ODK/REDCap/CAPI etc. should only allow for responses that are single select, multiple select, or numeric text entry. This means that you cannot ask open-ended questions.

*For example, do not try to ask, "*Describe what the differences are between a cross-sectional and a panel study. Type in your response below.*". Responses would be extremely tedious to grade and some data collectors may even enter responses in different languages etc.*
*Rather, a more suitable question would be to ask "*What are the differences between a cross-sectional and a panel survey? Select all possible answers:
A. Cross-sectional study you do not follow-up with participants over time
B. For a panel study you do not follow-up with participants
C. There is no difference, just the name but they are the same type of survey
D. None of the above are correct.*"*

- **Clearly worded questions and answer options**: Avoid complex and convoluted sentence constructions, double negatives, and informal or slang language that may be difficult for trainees to understand.
- **Appropriate questions**: After you have drafted the quiz questions and answer options in Word, ask yourself, as a team:
    a. Are the quiz questions designed to be compatible with ODK/REDCap/CAPI etc.?
    b. Does the test cover content that was covered at training?
    c. Does the test include content that was emphasized during previous training?
    d. Does the test capture what you thought you were testing for?
    e. Is the material in the test really what data collectors need to learn to help them understand study protocols and tools?

3. **Draft quiz intro and instructions**: Write clear instructions for the data collectors/field supervisors about the quiz they will be taking and what they should do. This two- or three-sentence introduction will also include a preview of the quiz, including directions about the length of time allowed and number of questions, to help data collectors use their time effectively during quizzes

4. **Modify the quiz in its Excel format for** ODK/REDCap/CAPI etc.**:** You will likely have already identified a previous ODK/REDCap/CAPI etc. -formatted quiz to use as a template, such as the final exam from the most recent training. Using that template, work with the programming team to modify the questions and answer options in the ODK/REDCap/CAPI etc. -formatted Excel quiz to match your new and adapted questions and answer options for this pre-test.

5. **Test the form:** Make sure that you and the programmer test the quiz, both to make sure the ODK/REDCap/CAPI etc. form is working well and also to review that the questions and answer options are clear and understandable. Ask colleagues who will not be taking the quiz to preview and provide feedback.

6. **Translate the quiz:** After testing the forms, send the quizzes to the translation team.

7. **Create the translated CAPI quiz**: Work with the ODK/REDCap/CAPI etc. and translation teams to create ODK/REDCap/CAPI etc. quizzes in the language of the training, if applicable.

8. **Update results in PowerPoint:** Update the results PowerPoint template to reflect the updated answer options and questions. (*We use PowerPoint to review and discuss as a*

group the results of the quiz, including question and answer options as well as what percentage of data collectors selected the correct response.) Finally, save this updated PowerPoint to the respective Dropbox folder.

Note that the ODK/REDCap/CAPI etc. team will be responsible for posting the quizzes to the server, pulling the results, and grading using the autograder (an Excel template that grades responses automatically). We do not intend to cover the autograder as part of this training.

Apply It to Try It!

Turn to the **Exercise, Section 4.1** in the ***Exercises*** section at the end of this Handbook for instructions on a short reflection activity for practicing the development of ODK/REDCap/CAPI etc. pre-tests.

Section 4.2: Developing other ODK/REDCap/CAPI assessments (*formative-quizzes during training + summative-final exams*)

Type: Quiz/test, by individual (e.g. quizzes about the surveys, final ODK/REDCap/CAPI etc. exams etc.)
Timing: throughout the training, *with frequency depending on length of training and amount of content covered*; minimally, a final exam (at very end of training)
Format: ODK/REDCap/CAPI etc.
Primary aim: to assess individual-level understanding of content

At all trainings, refresher or new staff trainings, the training material team is responsible for developing and finalizing all assessments and exams. It is a PMA standard to always include a pre-test and at least a final exam. Often, we also include an additional exam(s) that focus on new tools and changes, but as refresher trainings are typically very short, we are limited by the number of exams we can administer.

Steps to developing an ODK/REDCap/CAPI quiz/test:

1. **Develop theme and objectives**: When beginning to prepare any quiz, first decide the theme of the quiz (the main topic(s) to be covered) and also the quiz objective(s): Are you looking to identify what is misunderstood? Understand the effectiveness of a new training tool in teaching new content? Identify struggling data collectors to provide them with more support?

2. **Develop a detailed list of content to address in the quiz/test**: The list of potential quiz content can include survey question numbers, potential protocol questions, questions from PIs, etc. Each member of the training material development team should be working on identifying this content, as related to the quiz theme, and adding to the list. There are three main sources for identifying and developing content for this list:

- ***Data collector's manual***: Writing the manual content will build your familiarity and knowledge of protocols and tools that will be very helpful in drafting potential quiz questions. As you are working through the manual, try to simultaneously identify questions that are nuanced, tricky, technical, or may cause confusion, as these are usually good content for quizzes.

- ***PIs and technical leads:*** Reach out to the PIs and technical leads to ask them for suggestions for questions – including answer options – for each of the quizzes.

- ***Parking lot questions and comments:*** At the end of each training day, trainees often share questions and challenges they experienced in learning and practical exercises. Any questions that require the leadership team to discuss together before sharing a joint answer are 'parked' until there is consensus and clarity of the protocol, or the question asked. If possible, try to incorporate parking lot questions and comments into the quizzes. This may be a challenge depending on the length of the training days.

3. ***[follow Steps #2-8 above, in the "Steps to developing a pre-test"]***

Apply It to Try It!

Turn to the **Exercise, Section 4.2** in the ***Exercises*** section at the end of this Handbook for instructions on a short application activity for practicing the development of ODK/REDCap/CAPI assessments.

Section 4.3: Creating paper-based small group assessments (*formative*)

Type: Assessment, by small group
Timing: Daily, after small group sessions
Format: paper-based
Primary aim: to measure variations in supervisors and learnings among teams, and ensure that understanding of key messages, parking lot items, and overall study protocol are consistent among small groups

A standard training technique for our team is to instruct data collectors in small groups. Given the number of participants in our trainings, breaking into small groups for in-depth review of the manual is a great way to ensure that workshops are participatory. Small group work also provides an opportunity for information shared in the large groups sessions to be converted to practice, and with this practice comes a deeper understanding of the challenges of implementation/data collection.

However, *there is and can be variations among small groups*. To gauge variation and ensure consistency across groups, we give each small group a short quiz that summarizes key lessons from the day. This is a group assignment, but the supervisors/those leading the group must leave the room while the data collectors take the quiz together.

<u>Steps to developing a paper-based small group assessment</u>

**See steps in A and C for more information on key steps*

1. **Develop a daily small group quiz**: Based on the day's agenda, identify key content, questionnaire sections, and survey tools that will be covered during that day.

2. **Draft small group assessment questions**: To draft these questions, review the daily parking lot questions as well as questions added to the question box. You should also draw from what they hear during small group discussions with supervisors, as the questions that typically go into these assessments are meant to underscore areas where the teams may be struggling to have a clear understanding of and/or protocol or survey questions that need clarification.

3. **Test the assessment**: Reread the assessment to ensure that the questions and answer options are clear and understandable.

4. **Grade the assessments and review results**: Grade the assessments each night. Results from these quizzes should be tabulated and shared with the central team. As these quizzes are a means of evaluating the data collectors and the quality of training of each supervisor, it is important that no supervisors see these quizzes in advance.

Section 4.4: Preparing and facilitating interviews

4.4-A. Preparing for and facilitating in-class mock interviews (formative + summative)

<u>Type</u>: Mock interview, in pairs
<u>Timing</u>: To be conducted during trainings after review of the respective questionnaires
<u>Format</u>: live application activity in the training room
<u>Primary aim</u>: provide an opportunity for trainees to gain practice in reading and administering the questionnaire, and for trainers to assess participants' understanding and skills development in application

<u>Steps to preparing for and facilitating in-class mock interviews:</u>

1. **Prepare and share mock interview guidelines for trainers (*in advance*)**: Ensure that all trainers have clear and consistent guidelines for how to facilitate, 'grade' and provide feedback to trainees and other trainers on how data collectors are doing.

2. **Prepare mock interview scenarios**: Identify a few scenarios for data collectors to practice that reflect very common scenarios and/or common enough scenarios that may represent a challenge. Note the defining factors for the respondent in each of

these scenarios (e.g. age, contraceptive use, household size, etc.) Refer to the Basket of Tools for examples of scenarios that you can adapt for these in-class mock interviews.

3. **Lead demonstration interviews**: To help the data collectors with role plays/interview techniques, start by leading a few demonstration interviews in front of the large group, either immediately before the in-class mock interviews or at another point during the training. Demonstration interviews show how a good and efficient interview is conducted and what the process of interviewing looks like. Demonstration interviews can also be used to give examples of how to probe for ages and dates, how to handle an uncooperative respondent or how to tactfully get rid of unwanted listeners at an interview, or any aspect of filling in the questionnaire with which trainees are having particular difficulty.

   Remember to include adequate time for demonstration interviews when you are working on developing agendas, particularly for new training or newly added difficult questions!

4. **Explain the mock interview set-up to data collectors**: In a mock interview, one trainee interviews another. It is often useful to do mock interviews in groups of three or four so that two participants can observe the interview and take notes of the problems that occur. “Respondents” answer questions but need not answer truthfully if they do not want to. When the first interview in a group is finished, interviewers can rotate so that all members of the group get a chance to practice. Design mock interview rotations and instructions in a way that gives interviewers a lot of practice in *all* of the languages in which they will be working.

5. **Assign scenarios, break data collectors into mock interview groups, and observe the mock interviews**: Explain the basics of the scenario(s) to follow for the mock interview(s). Trainers will move from group to group, listening to parts of each interview and making note of any problems or errors.

6. **Debrief in plenary**: Discuss observed strong examples as well as problems and errors, section by section, with the larger training team.

4.4-B. Preparing for and facilitating field practice interviews (formative + summative)

Type: Field interview, in teams
Timing: after having reviewed all questionnaires (ideally)
Format: live interviews in the field with respondents
Primary aim: provide an opportunity for data collectors to gain comfort and familiarity with the survey questions, and for supervisors to gain insights into data collectors’ interview skills as well as their comfort and familiarity

Steps to preparing for and supporting field practice interviews:

1. **Prepare field teams (*in advance*)**: Organize interviewers into teams, either pairs or groups of four depending on training team size and logistics, each team accompanied by a field supervisor or a regional coordinator (RC).

2. **Observe data collectors conducting field practice interviews**: Data collectors conduct interviews with respondents at assigned structures and submit completed questionnaires to the test server. Field supervisors/RCs observe the performance of data collectors in the field and take notes on their observations.

3. **Provide feedback**: Field supervisors provide constructive feedback to the data collectors they observed. Avoid providing feedback *during* the interview itself as this may be distracting and stressing for the data collector. However, if the data collector is representing PMA very poorly, the field supervisor should intervene immediately in the most professional and least disruptive way possible.

4. **Debrief in large group**: Once back in the training room, share key challenges and lessons as observed across teams.

5. **Debrief in training group**: Supervisors share summaries with the central team and other supervisors, to understand common misunderstandings, areas to revisit during training, etc.

Apply It to Try It!

Turn to the **Exercise, Section 4.4** in the ***Exercises*** section at the end of this Handbook for instructions on two application activities to practice designing mock interview activities and giving feedback. If you follow the submission instructions for this exercise, you will also receive feedback on your work.

Continue to the **Exercise, Module 4** in the ***Exercises*** section at the end of this Handbook for instructions on an application activity that asks you to integrate these various assessments into the agenda you have been developing in previous exercises.

Remember the Timeline!

At this point, it is very hard to know how much content will need to be updated in the manual, so providing a timeline in this handbook for when this work should be completed may be a little challenging. That said, whenever you are completing the task of preparing assessments for a training, we recommend that you allow yourself and the team at least a month, depending on the number of assessments you will be developing. Ensure that you are communicating timelines and expectations to all on the team, that there is a team lead, and that the ODK/REDCap/CAPI and translation teams are updated throughout the process on timelines and expectations.

EVALUATION of Module 4: Prepare training assessments to measure and improve training effectiveness

1. Are there any questions that you still have about preparing training assessments to measure and improve training effectiveness after completion of this module?
   ____
   ____
   ____
   ____

2. Do you have any suggestions or comments about how we can make this module more useful for you?
   ____
   ____
   ____
   ____

3. Please indicate the degree to which you agree or disagree with the following statements:

	Strongly disagree	Somewhat disagree	Neutral	Somewhat agree	Strongly agree
This module increased my skills and knowledge of preparing training assessments.	1	2	3	4	5
I feel this module adequately prepared me to prepare training assessments.	1	2	3	4	5
I am confident that I now have the skills to prepare training assessments.	1	2	3	4	5

Module 5: Field staff training session design

Now that the basic reverse-design agenda is ready, it is time to start further designing and preparing each session, while also preparing to generally facilitate the training.

The Facilitation Guide

Because of the importance of training design and facilitation, there is an entire manual in the PMA Basket of Tools.

This comprehensive guide has 3 main objectives:

1. To prepare facilitators
2. To structure the first few days of pre-training collaboration for both facilitators and participants
3. To provide facilitators with a reference when facing certain challenges

The Facilitation Guide is a lengthy document and is not meant to be read all in one sitting! That said, as a reference document, it will be important that you have looked through the document in its entirety before you begin planning a field staff training so that you know what it contains and how and when it can be helpful. In order to orient you to the guide and to practice some of the skills that are contained within, this manual will point your attention to five sections of the Facilitation Guide that we find to be particularly important and give you the opportunity to apply and practice your learning!

Remember: Designing a training is not simply providing the content to the intended audience. It also includes designing *how* to teach that content such that your audience best understands and remembers the content. Yes, content is very important! But you must balance the content and the process of teaching, as the most important content in the world means nothing if those it is meant to inform cannot understand or remember it.

Balancing content and process is a lifelong skill that we can all continue to work on, which is why the Facilitation Guide is meant to be used for two purposes and timeframes:

- As a **teaching document** as you build your skills **now**
- As an **ongoing reference and resource**, as you hone these skills through increased design and facilitation practice

Objectives:

1. To familiarize yourself with key components of the Facilitation Guide that is found in the Training Basket

2. To design learner-centered training sessions that respond to the stated objectives

This module includes the following sections:

Section 5.1: Designing for Your Participants

Section 5.2: Designing Training Session Formats and Preparing Materials

Section 5.1: Designing for your participants

You have established the order in which you'd like to cover the Main Objectives and Skills and the approximate amount of time you will dedicate to each. You have begun to add different sources of Content and various Formats, including assessments.

Before continuing to develop the session Formats for teaching each Skill, it's time to pause and adopt a mindset that is key when designing your agenda:

> ***Think about your learners***.

There is a section on "Improving Facilitation of Adult Learning" in the Facilitation Guide that is worth reviewing. This section emphasizes the importance of the data collector training as well as the unique nature of adult learners. The way you decide to teach each Skill really depends on ***who*** your learners are, ***how*** they are used to being given information and learning, and ***what*** might be particularly challenging or easy for them. Your teaching strategy will rely on this information to best meet the needs of your learners.

> As an extreme example, you would not teach a 5-year-old and a 50-year-old to tie a tie in the same way. You would adjust your language, use different techniques, and practice for different amounts of time.

Similarly, you have to think about the lives, experiences, level of education, and learning styles of the data collectors when designing your sessions.

Preparing to design for your Adult Learners

Additionally, refer to the **Participant Profile Worksheet** – *this document provides an example of what it means to think about **WHO** your participants are when designing the training*

Finally, consider the activity below from the Facilitation Guide that looks at how to think through and identify ways to use adult learning principles during the data collector Training.

> *You are welcome to complete this activity as a group, but it is not a required exercise.*

PREPARE	Preparing for Adult Learners	
Objective	Think through and identify ways to make these Adult Learning Principles actionable during this data collector training.	Beginning of Training *** · Plenary · Discussion · Flipchart
Approach	Ask participants to brainstorm on one or more of the following elements, either individually or in groups. Then, have a few share the highlights of their brainstorming with the group: 1. Explain the "why": List other options for explaining why PMA operates as it does, without saying that it is protocol or that this is how it has always been done. 2. Learners' past experiences: Imagine three types of data collectors: the experienced enumerator, the college graduate, and the stay-at-home mother. Make a list of different types of past experiences for each that could be relevant to their work as data collectors with PMA. 3. Content for performance + Problem-solving orientation: Identify one session that is crucial to maintain in the data collector training but that often gets feedback about being irrelevant or unnecessary. Brainstorm coherent and convincing arguments that link this session's content to solving a true and frequent problem while also leading to better data collector performance. 4. Intrinsic and extrinsic motivation[2]: Make two equal-length lists of ways to (1) encourage intrinsic motivation, and (2) create systems for extrinsic motivation. Put a check-mark next to items that are already being done, at some level, during the training. Circle items that are not yet being done and discuss how to make them actionable during this training.	
Debriefing		

Apply It to Try It!

Turn to the **Exercise, Section 5.1** in the ***Exercises*** section at the end of this Handbook for instructions on a reflection activity for better understanding and preparing to design activities for your different participants

[2] As noted in the Facilitation Guide: "**Extrinsic** has to do with external things such as winning a prize or earning a certificate or badge or moving towards a raise or promotion. **Intrinsic** has to do with gaining a sense of accomplishment or solving a problem the learner has been grappling with or gaining esteem, power, or responsibility. So we find out what agents hope to gain from the training, we invite them to connect the learning to their personal needs, and we connect the learning to individual long-range goals. We also play games, collaborate, award certificates and badges, practice, and recognize accomplishment. Take time during the training, especially during the first day or two, to build pride for PMA's mission and work and to help REs understand the potential for personal and professional growth through this work. REs who are proud of what they are doing and how they are growing will benefit from intrinsic motivation. Also be sure to create a training environment with sufficient extrinsic motivation, through praise, small prizes, workshop-end certificates, and other elements that build and maintain this motivation.

Section 5.2: Designing training session formats and preparing materials

You have your tentative agenda; you've thought about your participants. Now it's time to continue deciding exactly how to design each training activity in a way that best teaches the Skills and aims to meet the Main Objectives, so that you can then prepare *or adapt* training materials accordingly.

Making Intentional Design Choices

As the Guide suggests, there is no one best way to design a training session. Any method of teaching will work as long as it takes into consideration (1) the learners, (2) the session objective and related Skill(s), (3) the training's Main Objectives, and (4) ways to engage the learner. Additionally, while we rely heavily on reviewing the training manual in small groups, all training should attempt to incorporate <u>active</u> forms of learning, rather than focusing on purely passive teaching strategies. (*See below for a more detailed description of active and passive learning*). The key is to **be intentional about these choices**.

> For example, if you choose to give a lecture, there should be a reason that you decide on lecturing over a different teaching method, such as small group work or role-playing activities. Maybe you have chosen the lecture format for an introduction session because you want to make sure to orient the group in a uniform fashion and form group cohesion.

Additionally, as with any time you choose a lecture format, think about and plan for how you can engage the audience such that you aren't talking *at* them but rather bringing them into the conversation.

> For example, while introducing the organization, as a way to both engage your listeners and draw on their expertise, you ask the group to reflect on their own experience with being surveyed for research, or to brainstorm ideas of how this information might benefit their communities.

What is the difference between active and passive learning?

Active learning involves getting students to engage in their learning process by first doing something and then reflecting on what they did – what worked and what didn't, what they understood clearly and what was confusing or missing from their understanding. <u>Remember the "reflecting" part, as it is this part that solidifies the learning for the learner!</u>

> For example, the facilitator initiates a role-playing activity where two data collectors practice administering the survey to one another. They then reflect on their experiences in both roles and what that taught them about how to complete this task. They also get feedback from a field supervisor about how they can improve.

Passive learning involves providing information that will not change

> For example, the facilitator lectures to the participants on the process of interviewing, and then gives them a list of related protocols.

Both formats have a role in teaching. Passive learning is useful for objectives that require ***learning definitions and describing information*** – for example, when reading through the data collector manual to learn this standardized content. Active learning is useful for objectives that require ***applying a new skill***, as we remember and improve these skills through the process of practicing and making mistakes – for example, using ODK/REDCap/CAPI, etc.

Whenever possible, draw on agendas from previous trainings, adapting the information and the design to your context.

Start with existing training materials!

You do not have to start from scratch when designing the training sessions or preparing the related materials – nor should you! This isn't your first training, and it's definitely not PMA's first training. To use time wisely and to capitalize on existing training experience, draw on materials from previous trainings whenever possible, adapting the information and the design to your context.

There are many templates and other resources within the Basket of Tools that you can adapt and format to meet your needs.

Remember: If you use a template, you need to review it for updates and adaptations, changing any information that is not applicable to the current training, and changing any country-specific images and language so they are all appropriate for your audience.

> For example, you will have to update the country, the dates, and the people to align with the current training and team. Any time material says "[country]", you will have to change that to "Ethiopia".

Apply It to Try It!

Turn to the **Exercise, Section 5.2** in the ***Exercises*** section at the end of this Handbook for instructions on an application activity to continue developing your agenda by adding session formats for your identified Skills

EVALUATION of Module 5: Field staff training session design

1. Are there any questions that you still have about designing sessions for a field staff training?

____
____
____
____

2. Do you have any suggestions or comments about how we can make this module more useful for you?

____
____
____
____

3. Please complete the following evaluation by indicating the degree to which you agree or disagree with the following statements:

	Strongly disagree	Somewhat disagree	Neutral	Somewhat agree	Strongly agree
This module increased my skills and knowledge of how to design sessions for field staff trainings.	1	2	3	4	5
I feel this module adequately prepared me to design sessions for field staff trainings.	1	2	3	4	5
I am confident that I now have the skills to design sessions for field staff trainings.	1	2	3	4	5

Module 6: Planning for collaboration

The task of planning and carrying out a large training is a huge and complicated one! In order to be successful, not only does the training design need to be well thought-out, there needs to also be strong collaboration and coordination in order to prepare and carry out all of the related logistical and facilitation tasks.

This Module will provide some details on how your team might organize themselves for this collaboration and coordination. These elements should be incorporated throughout the training design, preparation, and facilitation processes.

Objectives:

1. To effectively collaborate in a team, identify and determine roles and responsibilities for members of the training team

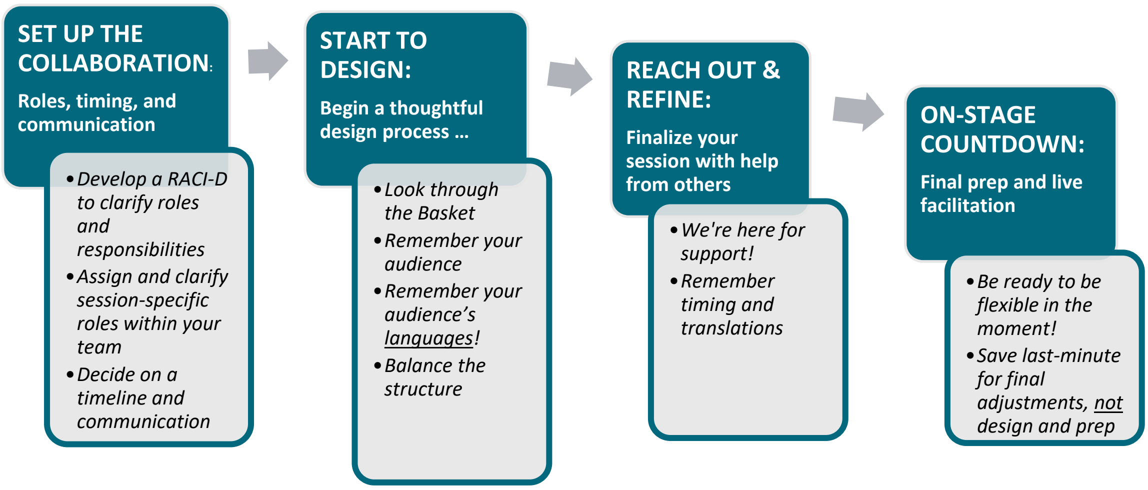
2. To understand important components needed to prepare and execute training sessions, including being able to determine format of the various training sessions needed.

This module includes the following sections:

Section 6.1: Planning for designing your assigned session(s)

This section will describe an ordered strategy for how to plan for collaboration of the training sessions.

Designing a Training Session, *from Facilitation Guide*



For this section specifically, we will refer to the first part of the design process, planning.

Planning training session design steps

Once you have established your team's strengths and weaknesses, the next step in designing is ***planning.*** The Guide emphasizes the time that will be saved when you begin the design process by assigning roles based on the unique skills of your team members. This work of assigning roles for collaboration during training preparation can build off of the work you did to complete the "Transversal Roles", meant to be applied during the actual training days. During this initial planning, you will address the elements of a fundamental question:

Who will complete what, and by when?

To respond to the question above, develop a timeline for the following training session design key steps. These steps are further explained in the Facilitation Guide and this manual.

1. Identify/confirm session-specific objectives and tools
2. Brainstorm on session formats
3. Draft a session plan that includes, at a minimum:
   a. Session title and objectives
   b. Timing, and facilitators
   c. High-level steps of the session
   d. Necessary set-up, supplies, technology
4. Prepare any support materials, such as PowerPoints and handouts

5. Finalize design and support materials
6. Run through the session, as a practice, with facilitators and co-facilitators; make any adjustments or improvements as necessary

Accountability and Communication

After first identifying the person or persons who will complete each of these tasks, you should establish an accountability mechanism and communication strategy to ensure that the team is working efficiently, effectively, and unitedly towards the various tasks and the overall desired goal. (*The EXERCISE for Section 6.2 suggests using a RACI-D format.*) The Facilitation Guide suggests a variety of potential communications platforms including Slack, Google Docs, emails, or regular in-person or phone meetings. It does not matter which platform you use, as long as everyone knows the method by which they should communicate, and the platform suits the group's needs.

Section 6.2: Facilitation Logistics and Assigning Training Preparatory Tasks

Once you have the training design completed, in addition to assigning individuals to prepare certain specific sessions, it's time to think about the broader facilitation logistics: what needs to be done and who is going to do it. Remember:

> **Facilitation becomes easier when the training environment is conducive to the agenda.**

When thinking about preparing the training environment, this is not limited to the training room itself, but to all of the materials, resources, and people that you will need for the training.

Logistical elements to consider

What might seem like a simple training session requires a lot of forethought and planning. For example:

What might you need to run a small group ODK/REDCap/CAPI etc. practice training session smoothly?

- **Time**: You won't need just the time for the small-group activity itself. You will also need to plan time for giving instructions, for students to move into and out of their groups, and for distributing materials to groups.
- **Room**: You will need enough space for both moving and working:
  - *Moving*: participants to move around to get to the groups, and facilitators to circulate amongst the groups
  - *Working*: participant groups to spread out such that they can work in distinct units and hear their group members well without too many distractions from other groups

- **Materials**: Either by creating or adapting them, you will need to prepare training materials related to your session design, such as PowerPoint presentations, handouts, and ODK/REDCap/CAPI etc. quizzes.
- **Resources**: You'll need to have ready any related resources for the session, such as smartphones, tape, or extra chairs. Remember: preparing a smartphone for an activity often involves various steps – assigning them, charging their batteries, ensuring a stable internet connection (*wifi or data*) to run the software.
- **People**: In addition to planning how to divide the participants, you'll need to prepare and assign a supervisor for every group to lead this session. This assigned supervisor should know their role in advance, so they know which group they are leading and are ready to take over as soon as the session begins. They should also be trained in advance on the activity and the relevant information, to ensure that all groups get standardized training and the same information. You will also need to assign a separate person to troubleshoot technological issues, and you yourself should ideally walk between the groups to observe and support, and more generally, to make sure that everything is running smoothly.

  ***** Don't assign too early, but don't assign too late**! You first need to have a fully developed agenda, have decided upon training session formats and materials, and have identified various logistical aspects. It's with these details that you can and should then start assigning and executing these preparatory tasks.

Apply It to Try It!

Turn to the **Exercise, Section 6.2** in the ***Exercises*** section at the end of this Handbook for instructions on an application activity to continue developing your agenda. You'll first review time and build out details for room, resources, and people. Then, you'll work on assigning the related preparatory tasks. If you follow the submission instructions for this exercise, you will also receive feedback on your work.

Section 6.3: The Facilitation Team for training days

Data collector trainings are a large undertaking, too much for any one person to manage on their own, as so many tasks need to be carried out at the same time during the training days themselves. Therefore, facilitations and design will require teamwork and communication. Start by knowing your team, becoming aware of the skills, expertise, and deficiencies that each of your team members possesses, so you can plan accordingly.

"Transversal Roles" of the Facilitation Guide will lead you through an exercise that allows you to assess the strengths and potential weaknesses of your team. The document will also help you to decide ***who*** should be responsible for ***what*** during the training. Assign these training roles based on team members skills. Also, be sure to discuss these roles as a team, so that, by the first day of training, every member knows their own responsibilities and those they can ask of others.

Apply It to Try It!

Turn to the **[Exercise, Section 6.3]** in the ***Exercises*** section at the end of this Handbook for instructions on an application activity for understanding and assigning Transversal Roles.

Remember the timeline!

As a training team, after emailing the manual to the translation team, come together to develop the training objectives, the agenda, the training RACI-D, the assessments, PowerPoints and any other training materials. At this time, you should assign roles, responsibilities, and timelines for each team member. The time needed to develop these materials will depend on the level of changes in the survey, the length of the trainings, and the experience of the assigned team member. The training team should allow at least 4 weeks to complete these items, prioritizing the completion of items that will need to be translated.

EVALUATION of Module 6: Planning for collaboration

1. Are there any questions that you still have about planning for collaboration to prepare and carry out a field staff training?
   ____
   ____
   ____
   ____

2. Do you have any suggestions or comments about how we can make this module more useful for you?
   ____
   ____
   ____
   ____

3. Please complete the following evaluation by indicating the degree to which you agree or disagree with the following statements:

	Strongly disagree	Somewhat disagree	Neutral	Somewhat agree	Strongly agree
This module increased my skills and knowledge of how to plan for collaboration to prepare and carry out field staff trainings.	1	2	3	4	5
I feel this module adequately prepared me to plan for collaboration to prepare and carry out field staff trainings.	1	2	3	4	5
I am confident that I now have the skills to plan for collaboration to prepare and carry out field staff trainings.	1	2	3	4	5

EXERCISES

Note to STLR users about these Exercises

During this section of this handbook, we have included exercises that correspond to the content and application of this content from each of the 6 Modules. These exercises are meant to give the learner an opportunity to apply what they learned in order to better understand it and identify what is not yet clear to them. As you review their exercises, you can also learn which concepts and skills will need further development and improve your support and training accordingly.

The below exercises are specific to PMA content. **We encourage you to maintain these exercises but adapt them heavily to meet your context and the needs of your team. You will also need to ensure that someone is in charge of receiving and providing feedback on the exercises that learners submit.**

Because the right answer(s) will depend on the modified question, as well as on the specifics and protocols of your team, we have *not* included an answer key. We highly suggest you develop an answer key to fit your modified questions and your context.

EXERCISE FOR Module 1: Navigating and Identifying training tools in the PMA Basket of Tools

Intro

You will engage with the Basket for the remaining modules, so now is a time to build up some basic curiosity and familiarity around the contents of the Basket.
We want you to become familiar with the PMA Training Tools Basket, how it's structured and how to find what you're looking for in it, so that you can start to use it regularly and effectively to refine and build upon the current training activities and approaches that exist.

Instructions

Participate in a "PMA Training Tools Basket" Scavenger Hunt!

> *What is a scavenger hunt? : "a game, typically played in an extensive outdoor area, in which participants have to collect a number of miscellaneous objects"*

In this PMA Training Tools Basket scavenger hunt, instead of scavenging in the woods for valuable but hidden trinkets, you'll be looking in the corners of the Dropbox folder "PMA Training Tools Basket" for valuable but slightly hidden tools.

Find the following items in the Basket of Tools and note the ID of each below.

Tool Description	***Tool ID or path***
A classic PPT that describes how data is sent from the data collector phone to the server and finally aggregated, cleaned, and presented in a PMA data brief	
A PPT that explains how to ask a question, how and why to probe, and when to use rare answers (don't know, refuse)	
A PPT introduction to some new facilitation tools, along with experiential education activities; session designed for and facilitated by PMA Nigeria team's pre-data collector training preparation session in October 2017	
A summary of the Top 10 things that a facilitator should keep in mind, in business card size	
A modifiable countdown timer, PowerPoint-based	
A PPT that describes a dozen household scenarios, of varying complexity, to review household roster eligibility	
A PPT that tells an animated "story" of Ms. Egg and Mr. Sperm, to explain the three types of contraception as an analogy	

EXERCISE FOR Section 2.1: Developing a general outline for the manual components

Intro

The exercise below gives you a chance to practice using a data collector manual's Table of Contents to navigate through the manual.

In PMA Basket of Tools, read more tips on updating the Manual:
0. Guides and Questionnaires (verified) → "id090 About updating the RE Guide and PowerPoint 81106.docx".

Instructions

1. Find the most recent data collector manual that your team has used for a data collector training.
2. Review this manual's Table of Contents.
3. Using the Table of Contents, verify that the following components are included in the guide:
   - ☐ Contact information
   - ☐ Acronyms and terminology
   - ☐ Survey design protocol sections
   - ☐ Use of ODK/REDCap/CAPI etc. and any additional technology
   - ☐ General questionnaire and section introductions
   - ☐ Survey questions and response sets, with question-by-question explanations
   - ☐ Appendix
4. Try to share with someone else a verbal narrative of the logical progression of the sections in this manual. What is first, and then what and why? (*This is almost like reading the list of chapters in a novel to remind yourself of the major parts of the story. You are making sense of and summarizing the entire document by using the Table of Contents.*)
5. Using only the Table of Contents, look up some information that you might have questions about or need a refresher on.
6. How easy was it to #3 summarize and #4 look up information? With a strong manual, and well-structured and relevant, practical content, these tasks should be relatively easy! This is the ease that you will be striving to attain with first your guide outline, and then eventually your resulting manual and its Table of Contents.

EXERCISE FOR Section 2.2: Developing or updating survey design protocol sections

Intro

The exercise below gives you a chance to practice updating survey design protocol sections and receive feedback for your work.

In PMA Basket of Tools, read more tips on updating the data collector's manual:
0. Guides and Questionnaires (verified) → **"id090 About updating the RE Guide and PowerPoint 81106.docx"**.

Context

Developing and refining content for the manual often requires practice in identifying what information to include and then writing this information clearly.
It **is essential to remember the audience and purpose of the document**. Especially in writing the training manual for data collectors, writers and contributors to the manual must know how to write in a clear and direct way for this audience.

Instructions

1. Read the "excerpt from previous RE training manual", *below*
2. Read the bullet points summarizing the "changes to protocol that needs to be updated", *below*
3. Update the excerpt to include these changes

   Note: The below excerpt only includes a short section of the manual. You can write more or less than what is listed above as long as you adequately and clearly capture the changes listed above. Lastly, this is just an example for learning purposes and does not reflect any real changes to the protocol.
4. Ask another member of your team to review your updated excerpt and provide feedback, using track-changes and, where helpful and feasible, also discussing this feedback with you.
5. Incorporate this "peer feedback" as you see fit.
6. **Email your suggested revisions to the excerpt above to the program manager coordinating your training on this module; please send *both* the pre-peer review version and your final post-peer review version. He/she will set the exact due date; we recommend a due date of two weeks after this module is assigned to you.**

Excerpt from previous RE training manual

Follow-up Interview Procedures for Panel Survey

Who will you interview?

Women will be identified and enrolled in the Panel survey using the Female Screening Questionnaire at the time of the census. Women are eligible to be enrolled in the Panel survey if they are:

1. Usual members of the household or have come to this household for their pregnancy/postpartum period
2. Currently pregnant. The number of completed months of pregnancy does not matter, all currently pregnant women who are usual members of the households are eligible to be enrolled.
3. Women who are less than six weeks postpartum at time of census and screening.
5. All currently pregnant or recently postpartum and staying in the same household and *moving temporarily* to a neighboring kebele/woreda immediately before/after the birth

They are not eligible to be enrolled if they are:
1. Visitors to the household
2. Not pregnant
3. More than six weeks postpartum at time of census

ODK/REDCap/CAPI etc. will determine eligibility based on these criteria. If a woman is eligible, explain the purpose of the study and the procedures by reading the informed consent script on the screen. If she has any additional questions, explain them before asking her to enroll. If she chooses to enroll, you will give her an ID card that you will fill with relevant information based on the screening form. **It is extremely important that she keep this ID card for the duration of the survey.** The ID card is how we will enter consistent identification across each follow-up interview. The ID card will be described in more detail later.

Changes to protocol that needs to be updated

For the new cohort, data collectors will still use the female screening form to screen for, but eligibility has changed.

1. Those eligible to enroll into the study are:
   - All pregnant women ages 15-49 regardless of residence status. This means we will include all pregnant guests
     - For guests we will have phone follow-up if they live outside the Kebele

   AND
   - All recently postpartum women (less than 8 weeks postpartum at census/screening)
     - These women can be usual residents or staying at their parents' home for labor/postpartum. No other type of guests who are postpartum can be enrolled
2. To limit loss to follow-up, we will have phone follow-up for all enrolled women who have moved out of the kebele.
3. Not eligible to enroll:
   - Women who are not pregnant or < 6 weeks postpartum
   - Unmarried adolescents regardless of pregnancy status
4. ID card will not be given to the respondent. Only the data collector and her supervisor will have the ID cards because respondents often lose them.
5. Paper consent forms will be given to the respondent. data collectors must re-read the entire consent script before every interview

EXERCISE FOR Section 2.3: Adding survey questions to the manual

Intro

This exercise gives you a chance to practice adding and updating survey questions and response sets in the manual, as a way to test your new skills.

Instructions

1. Using the survey questions below, create a table to display the survey questions and response sets in the manual.
2. We will divide the below amongst the participants and for each question and response set you are assigned, write a description as you think would be appropriate for the data collector training manual.

Send this document to the person guiding you through the modules in this handbook. You are expected to complete this exercise within 3 weeks.

Survey Questions

In the past four weeks, did you or any household member have to eat a limited variety of foods due to a lack of resources?	Yes........ 1 No .... 0 No response .... -99
In the past four weeks, were you or any household member not able to eat the kinds of foods you preferred because of a lack of resources?	Yes........ 1 No .... 0 No response .... -99
In the past four weeks, did you or any household member have to eat some foods that you really did not want to eat because of a lack of resources to obtain other types of food?	Yes........ 1 No .... 0 No response .... -99
Does this facility accept patients who are infected with COVID-19 for services and/or treatment?	Yes........ 1 No .... 0 No response .... -99 Do not know .... -88
What is the highest level of school your husband/partner attended? *Only record formal schooling. Do not record bible or koranic school or short courses*	Never attended .... 0 Primary .... 1 Secondary .... 2 Technical & vocational .... 3 Higher........4 Don't know........ -88 No response .... -99
How old is your husband/partner? *If respondent is unsure, she can estimate his age*	Age (years): Don't know........ -88 No response .... -99
Will you take vaccination against Coronavirus (COVID-19) if it is offered to you?	Yes, I will take .... 1 No, I won't .... 0 Do not know........ -88 No response .... -99

Since the Coronavirus (COVID-19) restrictions began, how much of a loss of income has your household experienced? *Read all options*	No change………………………………1 Partial ………………………………2 Complete……………..…………………..3 Do not know.............................. -88 No response…………………………-99
Sometimes conflict can occur in relationships. At any time during your pregnancy, did your husband/partner do any of the following things to you: **A. Push you, shake you, or throw something at you?** **B. Slap you?** **C. Twist your arm or pull your hair?** **D. Punch you with his fist or with something that could hurt you?** **E. Kick you, drag you, or beat you up?** **F. Try to choke you or burn you on purpose?** **G. Threaten or attack you with a knife, gun, or other weapon?** **H. Physically force you to have sexual intercourse with him when you did not want to?** **I. Physically force you to perform any other sexual acts you did not want to?** **J. Used threats or pressure to make you have sex when you didn't want to, but did not use physical force?**	Yes... 1 No .... 0 No response .... -99
Has COVID-19 changed the way that key outcome data, such as the number of monthly deliveries, live births, and maternal or neonatal deaths, are reported?	Yes... 1 No .... 0 No response .... -99 Do not know .... -88
Does this facility have a policy that allows the "rooming-in" of a mother and her baby? *Hint: "Rooming-in" refers to the policy of not separating a mother and her baby in the post-delivery period.*	Yes... 1 No .... 0 No response .... -99 Do not know .... -88
Does this facility have a policy that allows women to have a companion of her choice with her during labor and/or delivery?	Yes, during labor 3 Yes, during delivery 2 Yes, during labor and delivery 1 No 0 Don't know -88 No response .... -99
Is it the policy of this facility to routinely encourage exclusive breast feeding?	Yes... 1 No .... 0 No response .... -99 Do not know -88
Is KMC (kangaroo mother care) for premature/very small babies) used in this facility?	Yes... 1 No .... 0 No response .... -99 Do not know -88
Has KMC been provided at any time during the past 3 months?	Yes... 1 No .... 0 No response .... -99 Do not know -88

EXERCISE FOR Section 2.4: Establishing group norms

Intro

This exercise gives you and your colleagues the opportunity to establish or revise/update your team norms around collaboration, particularly within the work needed to be done to prepare and carry out a data collector training.

Instructions

1. As a team (*with as many members participating as is feasible*), gather to brainstorm norms around collaboration for the upcoming work on preparing and carrying out the data collector training. How should team members communicate their progress? Their need for help? What happens if they may be late on a task? If they disagree with the design of a session? Etc.
2. Ask someone to record the norms suggested by team members. As this is a brainstorming, there should be no commenting or critiquing; the focus is more on quantity than on quality at this stage. Once the ideas or the allotted time are/is exhausted, link or cross off redundant ideas.
3. Once the list of group norms is generated, identify and cross redundant ideas off the list.
4. Decide which norms to keep. You can keep them all or walk the team through a discussion of which ones they all support and want to keep.
5. Decide on how norms will be enforced, notably: How might any member of the team bring up a norms violation? What might they say, to whom, and how?
6. Decide on how norms will be modified, in the event team members find them too strict, too lax, or no longer relevant or helpful?

EXERCISE for Module 3: Design training agendas, rooted in clear objectives

Intro
In order to practice, we would like you to begin to design a data collector training agenda.

PART A
Instructions

1. Using the Main (Learning) Objectives and Agenda Template below, begin to develop the agenda for four-day data collector refresher training session that will run from 9:00AM-4:00PM each day.

   Remember to first develop a logical order for the Main Objectives and their related Skills, and to make time in the schedule for introductions, comfort, and wrap-up.

   Your Start and End Times will be estimates for now and will help you to understand how each training day might flow. You can refine this timing in further exercises.

2. Please also provide feedback on the "Main Objectives" listed below. Would you recommend any changes to any of the Objectives? If so, what changes would you recommend?

PART B

Instructions

3. Looking at the Skills listed in your agenda from the previous exercise, identify the Skill that was particularly challenging to teach field agents during the previous training. (*If you have not attended previous trainings, identify a listed Skill that you could imagine may be difficult to teach.*)
4. Identify which of the 10 numbered folders or the various lettered folders in the Basket of Tools might contain tools addressing this Skill; when in doubt, use the search bar and search for the key terms and/or start opening folders to see if their content is related to your topic

   ** also see "id000 README Navigating the Basket of Tools.txt" for further reference about the organization of content in the Basket*
5. Spend 15 minutes browsing through the relevant folder(s), trying to identify at least one tool that might help you to teach this Skill differently or better; in the process, you will likely be opening different folders and tools
6. Share with a colleague at least one tool you found that might interest them.
7. Add two columns, one entitled "Content" and the other "Format", to the agenda you began developing in the previous exercise. List the tool(s) you identified in this exercise in the appropriate column(s).

   As a reminder:
   - **Content** – *sources of information about these skills, e.g. a section of the manual or a job aid*

- **Format –** *how to best teach these Skills using the identified Content, e.g. a quiz or a role-playing activity*

FINALIZING AND SHARING

Please complete the above tasks, Parts A and B, and return to the person guiding you through the modules in this handbook. You are expected to complete this exercise within one week of starting this chapter review.

***Note**: The remaining sections of this handbook will guide you through including more detail in this agenda, so this version need not be very detailed. This version should focus on deciding on an order for the Skills, making preliminary decisions about the time needed to teach each Skill, and beginning to populate the agenda with some initial Content and Format information.

Main Objectives

Please include all of these Main Objectives. We have listed some of their related Skills; feel free to include additional related Skills as well.

1. By the end of this training, data collectors will be able to demonstrate their ability to administer with a respondent the most recent questionnaire with ODK/REDCap/CAPI etc.

   Related Skills:

   a. identifying questionnaire changes
   b. comfort administering new questions and coding responses
   c. following correct submission order for survey forms

2. By the end of this training, data collectors will be able to give examples of how they will follow established protocol in the field.

   Related Skills:

   a. identifying changes to protocol
   b. planning for how to apply protocol in complicated cases
   c. planning for what to do when a case cannot be addressed with existing protocol

3. By the end of this training, data collectors will understand the data collection timeline.

   Related Skills:

   a. planning in alignment with data collection timeline

Agenda Template *

** NOTE: This is a partial "Agenda Template", to which you will be adding columns and filling in information progressively, with exercises from the upcoming modules. To see what a full "Agenda Template" will look like for all of these exercises, click here. We also encourage you to consider building your Agenda Template in an Excel document, so it is easier to build out columns and rows, as necessary.*

Feel free to add additional rows as necessary.

Time			Reverse Design elements			
Start Time	End Time	Duration	Skill(s) that will be covered **** List one or multiple Skill(s) for each time slot; all Skills must be listed at least once*	Main Objective(s) the Skill contributes to **** List one or multiple Main Objective(s) for each time slot; all Main Objectives must be listed at least once*	Content	Format

EXERCISE for Section 4.1: Developing Phone/Tablet-based pre-test (*formative assessment*)

Intro

The exercise below asks you to practice developing ODK/REDCap/CAPI etc. -based pre-tests.

Instructions

Convert the following short-answer question prompts into questions that could be used in ODK/REDCap/CAPI etc. with single-select, multiple-select, or numeric-entry response sets:

1. Describe the importance of informed consent.
2. What should be done if a respondent refuses to participate?
3. What should a data collector do if a parent consents to his/her minor participating in the survey, but the minor refuses to provide assent?

EXERCISE for Section 4.2: Developing other Phone/Tablet-based assessments (*formative + summative*)

Intro

The exercise below is meant to give you practice developing ODK/REDCap/CAPI etc. assessments.

Instructions

Read the excerpts from the manual below and develop a total of five questions for an ODK/REDCap/CAPI etc. individual assessment. While you will be working as a team during actual prep work for the trainings, all of these assignments are individual assignments.

Return this assignment to the person guiding you through the modules in this handbook. You are expected to complete this exercise within three weeks of starting this chapter review.

Excerpt from RE training manual

PMA Ethiopia Panel Survey: Flow of field work

- You will conduct a **census of all households in your EA and complete a paper listing form**. Using the census, you will develop a household roster to identify eligible females for the panel survey in every household.
- You will conduct **one female screening questionnaire for each female member** of a household who is between the ages of 15-49. Women who are usual members of a household OR those staying temporarily at their parents' home for pregnancy, labor and postpartum will be eligible for the female screening form.
- Any women (*regular household members OR women staying at their parents' home for pregnancy and postpartum*) who are **currently pregnant or less than 6 weeks postpartum**, you will attempt to *enroll into study*. For all the women who you successfully enrolled in the panel, you will RETURN to the household and complete the household and female questionnaire for each panel woman AFTER the census is complete.
- You will share your completed paper listing form with your supervisor after census for him/her to randomly select 35 households.
- If an enrolled woman is currently pregnant, or less than 6 weeks postpartum at the time of the census you will wait to interview her for the female questionnaire until after your supervisor has made the random selection of the 35 households. We estimate it will take about two weeks for you to complete the census, finalize the paper listing form and your supervisor to select the households.
- After your supervisor has selected 35 households, you will return to the EA and interview:
    - The 35 randomly selected households and the eligible women for the cross-section.
      AND
    - You will also complete the HHQ and FQ for each pregnant/recently postpartum woman you enrolled in the panel at census. We refer to this as the baseline interview for panel women – i.e. completing the HHQ/FQ for panel women.
- You will then return to interview panel women at three different times - six weeks, six months and one year postpartum after enrollment.
    - The only exception to this is women who received the six-week questionnaire at baseline because they are already 5-8 weeks postpartum. You will return twice to interview them – six months and one year postpartum.

When do you administer the Six-Week Form?

In general, the Female Questionnaire, along with the Household Questionnaire, will be administered to every woman enrolled in the Panel study about 2 weeks after the Census– roughly the time it takes you, the RE, to complete the Census activity in your EA.

However, the timing for administering the Six-Week Questionnaire will vary, as it **needs to be administered during a woman's "5-8-Week Postpartum Window"**. There are **two** possible scenarios:

- **Women who are in the 5-8-Week Postpartum Window *during* baseline = administer 6-Week Questionnaire (as part of FQ) *during* baseline visit:** IF, during a baseline, woman is currently 5-8 weeks postpartum, the RE will administer the Six-Week Questionnaire at baseline (reminder: baseline will be about two-weeks after census when you return to conduct the cross-section surveys and follow-up with panel women). For these women, those who are within the eligibility window for the six-week interview, the six-week questionnaire will be asked at baseline as a part of the Female Questionnaire. Therefore, if a woman is in the 5-8-Week Postpartum Window when the RE visits to complete the Household Questionnaire and the Female Questionnaire, the RE will administer the 6-Week Questionnaire as part of the Female Questionnaire. For these respondents, the RE will administer the 6-week interview by opening a linked Female Questionnaire form from 'Edit Saved Forms' in ODK.
- **Women who enter the 5-8-Week Postpartum Window *after* the baseline visit = schedule later visit for 6-Week Questionnaire:** For women who are pregnant or less than 5 weeks postpartum at baseline, the RE will schedule during her visit to administer the Female and Household Questionnaires for baseline, a return visit to administer the 6-Week Questionnaire, ensuring that the timing for this visit falls within the 5-8-Week Postpartum Window. (ODK will prompt the RE to schedule this visit by asking scheduling questions at the end of the FQ.) During this return visit, she will have to administer the 6-Week Questionnaire as a stand-alone questionnaire; since the Female Questionnaire will have already been completed, the 6-Week Questionnaire will be detached from the rest of the Female Questionnaire and will not be automatically created and linked. (In ODK, she will go to 'Fill Blank Form' and follow the prompts to complete the form.)

Lost to follow-up

Being lost to follow-up means a woman who was enrolled in the study can no longer be found for interview and information is not collected about her even though the study is still ongoing. A woman may be lost to follow-up if:

1. ***She died after the screening.*** In this case, select the response option "Respondent death". You will no longer return to the household

2. ***She moves outside of the study area.*** The study area, for PMA Ethiopia panel study is [X].

    a) *Temporarily moves*, if a woman moves temporarily (e.g. to birth the baby in her maternal home), regardless of whether she moved by herself or with her household *you will be required to follow-up with her*. This is the same protocol for women in rural ***and*** urban areas.

    If a respondent has moved temporarily to her maternal home for delivery, the RE should have noted this intention to move at time of screening and enrollment and alerted her supervisor that the respondent plans to move temporarily.

    b) *Permanent moves*, if the respondent has permanently moved from the original household we will **only** follow her if the new home is located *within the boundary of X; otherwise, we will consider her as a lost to follow-up*. For respondents who live in urban areas (Addis Ababa and other cities), the RE will be required to follow-up with the respondent if she has moved to any other place within the city boundaries. For example, if a respondent was originally living in Y in Addis Ababa and later moved to Z you will have to follow-up with her.

If the household is still there and only the woman has moved, confirm this information with the household head and also independently with the respondent and update your supervisor of this change. If she has indeed moved outside the study area (outside X or outside of the city limits) we will consider the woman as lost to follow-up and mark the questionnaire as 'Respondent moved'.

If the entire household has moved, and you have no information on where she moved or if it is not within the study area, contact your supervisor so that they are aware but you will not continue with the study. All moves will be confirmed by the central team. Mark relevant interviews as "Household moved" and submit to the server.

3. ***Unable to locate respondent*** If the RE cannot locate the woman in the allotted time for the interviews the RE must verify if the woman and household are still in the same place and submit the respective interviews with the completion code "Not at home", "Respondent moved" or "Household moved" depending on the reason.

4. ***The woman enrolls but refuses to complete an interview.*** If a woman enrolls but later refuses to complete an interview and asks you not to return, mark the relevant interviews as refused and submit to the server. For example, if a woman completes interview 1, i.e. the six-week follow-up, but says she does not want to continue with the survey and refuses to change her mind, mark interview 2 (six-month) and interview 3 (one-year) as "Refused" and submit to the server. You must also update your progress report and update your supervisor when this occurs.

5. ***You cannot contact her within eight weeks of the birth.*** If you are unable to interview the woman within 8 weeks of the birth after at least three visits/attempts to contact her, you will mark the interview for the 6-weeks as "Respondent not found" and submit to the server. You will, however, return to complete the six-month or the one-year interview.

<u>What if …?</u>

1. ***You are able to locate the woman for the six-week interview but cannot find her within a 2-week window of the scheduled date for the six-month interview?*** If you can confirm that the household is still in the same place but cannot find the respondent select "Not at home". In this case, submit the six-week form with the completion code "Not at home", but you should still try to conduct the one-year interview.

2. ***You are able to locate the woman for the six months but cannot find her within 2 weeks of the scheduled date for the one year?*** If you cannot complete the one-year interview within two weeks, verify if the woman and household are still in the same place and submit the one-year form with the completion code "Not at home", "Respondent moved" or "Household moved" depending on the reason.

3. ***You enroll a woman who is 6 weeks postpartum and complete the HQ and FQ at census. This respondent's household is later selected for cross-section, do you have to repeat the FQ for the enrolled respondent?*** Yes. Even though you have completed the FQ form for this respondent, you still have to complete the FQ if she resides in or is visiting a randomly selected household. However, most of the questions that she will be asked will not be duplicated in the cross-section. Explain to the respondent that while she may have to repeat some information there are a number of questions in the cross-section version of the form that she was not asked before but are important to ask.

4. ***The woman has moved outside of the study area after enrollment but is willing to be contacted via phone for future follow-ups***. The RE is instructed to inform the respondent that all interviews must be carried out in-person. The RE must also update her supervisor. In cases such as these the RE must mark the questionnaire as 'respondent moved' or 'household moved', depending on her response. She will be considered lost to follow up.

5. ***The respondent had a pre-term delivery (4 weeks before due date) and was not able to tell the RE before the scheduled 6-week follow-up. At time of scheduled follow-up, the woman is now over 8 weeks postpartum - she is out of eligibility window?*** It is critically important that you maintain regular contact with the HDA working in your EA so that you are updated about each respondents' actual date

of delivery. The HDA will also be able to let you know if the respondent had a preterm birth. You have to use the resources of the HDA so that you can interview the women within the eligibility window. If there is no HDA in your EA and were unable to follow-up with the respondent before her 8th week postpartum date mark the interview for the 6-weeks as “Respondent not found” and submit to the server. You will however return to try and complete the six-month or the one-year interview.

6. ***The respondent had a miscarriage since enrollment. Should the RE still follow-up at 6 weeks?*** Yes. We will be enrolling women at all stages of pregnancy and it is possible that we you may identify a respondent very early in her pregnancy and successfully enroll her. You have completed the household and female questionnaire, and later find out that she was not able to complete the pregnancy. In these cases, try to learn when the pregnancy ended and follow-up with the respondent for the 6-week interview. Indicate whether she was unable to complete the pregnancy due to miscarriage. You will not follow-up with her for the 6 month and 1 year.

7. ***Changes in physical structures or dwelling unit***. If the originally identified household structure has been destroyed, changed to a commercial property or otherwise does not house the enrolled woman and her household then you are instructed to contact the woman via phone to verify this change. At enrollment, you will collect each consented woman’s primary, and if possible secondary number. In the event that the numbers shared earlier are not working, you are advised to ask neighbors and members in the community about the whereabouts of the family and confirm that the women is still living within the kebele. If the woman has moved out of the kebele, you will update your supervisor on how that information was confirmed and the respondent will be considered lost to follow-up and mark the questionnaire as ‘Respondent moved’. You will also update her progress report to document this. If the woman has moved within the kebele, you will locate the woman and continue with her scheduled follow-up interviews even though she has moved from her original household/structure.

8. ***What if a respondent is staying temporarily at her parents’ home for the birth of the child, is she considered a guest?*** PMA defines a guest as someone who stays in the home overnight. If a pregnant/recently postpartum woman is staying at her parents’ home during census and screening and this is typically not her permanent residence she would be eligible to enroll in the panel, even if she plans to move back to her home/with her husband some months or weeks after birth. If her home with her husband is outside of X we will consider her lost to follow-up for the subsequent follow-up forms, but you will be expected to ask her for consent to enroll and complete the baseline survey.

FFQ073-078 *refer only to the outcome of the birth that just occurred (index birth). The questions will repeat for each baby that was just born if there are multiple births:* **FFQ 073. What was the outcome of this pregnancy for the [first/second/third] baby born?** ○ Live birth ○ Still birth ○ Miscarriage (spontaneous) ○ Abortion ○ No response	**PREGNANCY OUTCOME** Record the pregnancy outcome for each baby born during the index pregnancy. Start with the first baby that was just born. *Live birth:* The baby showed signs of live Stillbirth: The woman gave birth to a child that showed no signs of life. *Miscarriage:* The pregnancy ended early and involuntarily. The pregnancy ended before labor or contractions started *Abortion:* The woman voluntarily terminated the pregnancy. **SIGNS OF LIFE**

FFQ 074. Did the baby cry or show any signs of life? ○ Yes ○ No ○ No response	This question is only asked to women who indicated that one or more babies' pregnancy outcome was a stillbirth. This question is very sensitive and it is very important that it is asked in a respectful manner. Signs of life include crying, breathing, or moving, even if they only survived for a few minutes. If a woman says NO, give examples of signs of life, while trying to make her feel comfortable.
FFQ 075. What was the name given to the baby that was just born? *Write 'Baby' if no name given* Name:	**CHILD'S NAME** Record the name of each child that the respondent names from the index birth. If the baby never had a name, either because it is still very young or because it died very young, write 'Baby' for the name. If there are multiple births and none have names write Baby-1, Baby-2, etc.
FFQ 076. Is [NAME] a boy or a girl? ○ Boy ○ Girl ○ No response	**CHILD'S SEX** Circle the code for the sex of the child. Do not assume the sex of the child from the name
FFQ 077. Is [NAME] still alive? ○ Yes ○ No ○ No response	**CHILD SURVIVAL** At the time of the interview, record whether the child from the index birth is still living.
FFQ 078. IF DEAD: Exactly how many days old was [NAME] when (he/she) died? Days: Weeks: ○ Don't know ○ No response	**CHILD AGE AT DEATH** Age at death information is recorded in days for the first interview. It is recorded in days and weeks for the second interview. Probe to find the exact age of death. If the baby died immediately after delivery, enter 0.

FFQ 145. Are you currently breastfeeding [NAME]? o Yes o No o No response	**CURRENTLY BREASTFEEDING** For women who have recently delivered a baby we want to know if they are currently breastfeeding. Note, that for this question we are *not* asking if she is exclusively breastfeeding, only that she is currently/still breastfeeding the index child.

FFQ 146. Are you using breastfeeding as a family planning method to delay or avoid getting pregnant? o Yes o No o No response	**USING LAM/BREASTFEEDING AS FAMILY PLANNING** Exclusive breastfeeding (feeding the baby only breast milk), on demand, for six months after a baby is born can help women and couples avoid getting pregnant but not all mothers know all the conditions needed to use LAM/exclusive breastfeeding as a form of family planning. For this question we want to know if the respondent is intentionally using breastfeeding as a method of family planning. As with all questions on LAM, please remember not to define LAM.
FFQ 147. How long do you plan to breastfeed [NAME]? Months: Years: o No response	**BREASTFEEDING INTENTIONS** If the respondent is currently breastfeeding her baby we want to know how long she plans or hopes to continue to breastfeed. Note that we are not asking about exclusive breastfeeding here. For some women who may be having a difficult time breastfeeding their newborn this can be a sensitive question. If the respondent has not been able to produce enough breast milk for her child but wants to be able to breastfeed for many more months but is unable to, record the amount of time she would like to breastfeed.
HFI034. In the past four weeks, were you or any household member not able to eat the kinds of foods you preferred because of a lack of resources? ○ Yes ○ No ○ No response	**Unable to eat preferred food** One domain of food insecurity (access) is having limited choices in the type of food that a household eats. This question asks whether any household member was not able to eat according to their preference due to a lack of resources. Preference can refer to the form of a particular food (i.e., whole rice vs. broken rice), type of staple (i.e., millet vs. corn) or a high-quality food (i.e., a piece of meat or fish). Preferred foods may or may not be nutritionally high quality. The interviewer should also read the definition of a "lack of resources." The respondent needs to answer on behalf of all household members.

Administering PMA questionnaires

THE PMAET COVID-19 Screening Survey

This is a short screening ODK survey that all REs must complete **before starting any interview. You cannot start any interview (HHQ or FQ) without completing this form**.

The short series of questions will help us identify if a respondent may need to seek receive testing for COVID-19 based on reported symptoms.

After recording all relevant location information, you will ask the below 5 questions to the respondent. You must submit the form after you complete it and also note this down in your summary of interviews to update your supervisor.

EXERCISES for Section 4.4: Preparing and facilitating interviews

Intro

Mock interviews are the moment to turn passive learning into active learning and give data collectors a chance to apply their interview skills and then reflect on what they know and what is unclear or needs improvement. It is your job to plan the structure of these mock interviews so they are effective moments of learning.

Instructions

Exercise 4.4-A:

1. Reviewing the Basket of Tools, write at least 3 scenarios for mock interviews. Use the PMA Ethiopia 2019 Female Questionnaire (available on the JHU Data Repository) to think about content.

    If you are new to writing scenarios for mock interviews, work with a more experienced PMA ET team member to understand what to include.

Return assignment to the person guiding you through the modules in this handbook. You are expected to complete this exercise within two weeks of starting this chapter review

Exercise 4.4-B:

1. Reviewing the Basket of Tools and previous training materials, write some tips and guidelines for field supervisors and RCs on how to give feedback to data collectors. While we have not developed these guidelines previously, developing and sharing them now will ensure consistency across training teams and sites. 2.

    Return assignment to the person guiding you through the modules in this handbook. You are expected to complete this exercise within two weeks of starting this chapter review.

EXERCISE for Module 4: Integrating assessments into the agenda

Intro
Assessments are Format types for your various sessions. Think through how to thoughtfully integrate assessments, and which type of assessment, into your training agenda.

Instructions
Using the agenda that you previously developed:

1. In the "Format" column, identify where you might integrate assessments, notably:
   - To confirm that participants have clearly understood a challenging Skill
   - To provide systematic check-in points where assessment provides overall feedback for the trainers and the participants on potentially problematic understanding of certain Skills that may need to be reviewed
   - To confirm at the end of the training that participants are ready to fully assume their roles

   You may need to add a few rows to your agenda for some of these assessments.
2. For each of these identified spots, discuss, decide, and then write down which type of assessment is most appropriate.

EXERCISE for Section 5.1: Designing for your participants

Intro

It is time to practice understanding and preparing to design activities based on the participants who will take part in the training.

Instructions

Please read the example participant profile below, taken from **00. Training Design, Prep, and Facilitation→ "id022 Participant Profile worksheet.docx"**. This profile describes Awa Coulibaly (fictional), a new enumerator for first-round data collection.

EXAMPLE

Participant Title: New, first-round enumerator

	Who am I *(titles and roles)*	**Three things that motivate me to participate in this work**	**Three things that motivate me to invest in doing a good job**
Awa Coulibaly	• Mother of 3 young children • Elementary school graduate • Sole earner in household	• Earn money for my family • Learn about family planning • Get out of the house	• Continue to earn money, maybe more money if I do well • Have higher status in the community • Not look foolish in front of my friends who also do this work

My pains and Objectives	**My personality**	**My skills**	**My Team** *(teachers, learners, advisors)*	**My relationship with...**
• Get recognized for doing good work • Get paid on time so I don't have to worry about making rent • Feel comfortable working for foreigners	• Timid; I don't raise my voice outside of the house • Strong emotional intelligence; I am very aware of others' feelings and try to accommodate for them • Patient; I take the time to help others understand new information	• Organized • Good listener	<u>At Home:</u> • Learn from my mom, who lives with us • Teach my 3 kids and the neighbor kids who come after school to study <u>At Work:</u> • A former supervisor at a call center who helped me to feel comfortable using the phone system	<u>Technology:</u> • Shaky; it's unpredictable – you touch one button and everything disappears <u>Formal[ized] education:</u> • Nervous; I'm too old for learning from books, and I was never good at it anyway <u>Health:</u> • Not so knowledgeable but I listen to this radio program on health that made me want to learn more so I can help my family become healthier <u>Research:</u> • Not for me; complicated stuff that people with big diplomas do on computers and in labs

Imagining that you are trying to plan a new data collector training for the panel survey, answer these questions:

1. What skills might this participant find particularly challenging?
2. When might it be helpful to draw on this participant's experience to reinforce their learning or the learning of the group?
3. What might motivate this participant to invest in their new role as a data collector?
4. In order to master ODK/REDCap/CAPI etc. skills, what teaching technique might best work for this participant: reading the manual, integration into a role-playing session, or individual practice with the smartphone? Why?

EXERCISE for Section 5.2: Designing training session formats and preparing materials

Intro

This activity asks you to search for, identify, and then add session Formats for your identified Skills to your ongoing agenda.

Context

This is an active learning activity: first complete the task described above, and then reflect on what you learned from it!

Instructions

Using the same agenda that you have been developing in the previous exercises:

1. Add an additional column for “materials”.
2. Fill out as much of the “Format” and “Materials” columns as possible.
   - **Session format**: Think about the best Format for teaching each of the targeted Skills and contributing to meeting your Main Objectives. Look at past agendas, browse through the Basket of Tools, and talk about what has worked in the past. While you *could* use only the Formats that were used in previous trainings, we encourage you to suggest at least a few changes to previous Formats, possibly including new Formats based on new ideas or tools you’ve discovered. Write the Format of each session in the appropriate box in your agenda.
   - **Materials**: Identify, and list in the appropriate box in your agenda, the training materials that will need to be prepared for each of these sessions, from PowerPoints and handouts to smartphones and ODK/REDCap/CAPI etc. versions, given their identified Formats.

EXERCISE for Section 6.2: Facilitation Logistics and Assigning Training Preparatory Tasks

Intro
This activity asks you to first think through and plan out the facilitation logistical elements and add them to your ongoing agenda. Then, you will continue to plan and build out your agenda by assigning the related preparatory tasks.

Instructions
This exercise has two parts, the first focused on facilitation logistics and the other focused on assigning tasks.

Both parts of the exercise should be completed as a group.

Part 1: Timing and Facilitation Logistics
Using the agenda that you previously developed and elaborated:
First, look at the agenda timing:

- **Review the "Start Time", "End Time", and "Duration" columns** – How much time do you need for the *entirety* of this session, from transition to start to end? Try to stay within the Duration that you had previously identified, but adjust as necessary, considering the Format you've identified for the session. Keep in mind, though, that if you add a bit of time to one session, you'll likely have to subtract some time from another session!
- [*if not already done*] **Add in time for breaks, meals, post-session question-and-answer periods and debriefing time, welcome and closing sessions**

  In theory, as part of your work in "Ordering and Prioritizing Skills", you have already budgeted enough time for these elements.

Then, add in three additional columns to address the logistical elements described in Section 5.5:

- **Room** – What do you need the room to look like?
- **Resources** – What resources are needed?
- **People** – Who will facilitate the session? Who will co-facilitate the session? If there are other roles that you will need to assign for this session (e.g. group leaders, technical support, etc.), who will play each of these roles?

  For the purposes of this exercise, you need not assign individuals; instead, simply list out the roles that you would need to assign.

Part 2: Assigning and Planning to Execute Training Preparatory Tasks
Working as a training group and based on the "materials" and "logistics" columns you have added and filled out in the previous assignments, develop a RACI-D for the 4-day refresher training for which you have developed the agenda.

There is an example RACI-D here to help you.

To develop your RACI-D:

1. Based on your logistics columns (Materials, Room, Resources, People) as well as other related training prep activities, make a **complete list** of all the pre-training tasks that need to be completed.
2. Once you have added as many tasks to this list as you can think of, **group the tasks** into categories.

   These categories might include elements such as "Creating session materials", "Ensuring data collector-related logistics", and "Obtaining and preparing resources".
3. **For each task**: Identify staff who are Responsible, Accountable, Consulted, Informed, and the Decision-Maker.

EXERCISE for Section 6.3: The Facilitation Team for training days

Intro

How you are going to share tasks during the training days itself is something that requires reflection and meticulous planning *in advance of* the first day of training.

Instructions

Complete the activity below. As you may not know the team you will be working with, use this activity to map your own skills/competencies and identify potential weaknesses.

Think critically about your own skillset and be willing to admit where you lack a skill or are weak in that skill. We are all on a spectrum of learning for each of these competencies and there is nothing shameful about being less skilled in one area. This is why teams exist: to create a balance of skill strengths and weaknesses such that you can work together, and share the tasks and efforts, in a way that optimizes the overall skills level.

ACTIVITY, Prepare:

Objective: Define and understand how to use designated hand signs to communicate amongst facilitators clearly and without disruption.

1. Discuss your group's current training needs, based on experience.
2. Review the listed Roles and Expertise. Refine the list to fit your group's identified needs: add and subtract roles, change role descriptions and responsibilities, etc. If the conversation about needs is challenging, try these sentence starters:
   * If only we had someone who could...
   * I would love to focus on my work as [*role*], but too often I get distracted by other tasks, like ...
   * Why is it that I always have to [*task(s)*]?
   * Why is it that we never seem to have time to [*task(s)*]?
   * I could facilitate [...] session, but I'd need some help with [*expertise area*].
3. Assign one person to each role on the refined list, reviewing responsibilities with each.
4. Decide when and how the group will revisit this list for: (re)assignments, additions and subtractions, and other modifications to improve the use and usefulness of Roles and Expertise.
5. Create a large poster of the titles and names of those appointed for each role. Stick this poster to a wall in the training room, in a place where it will be easily visible to those who are facilitating (normally near front of room).

Agenda Template *for Handbook Exercises*

Feel free to add additional rows as necessary

Time			Reverse Design elements				Logistics			
Start Time	End Time	Duration	Skill(s) that will be covered **** List one or multiple Skill(s) for each time slot; all Skills must be listed at least once*	Main Objective(s) the Skill contributes to **** List one or multiple Main Objective(s) for each time slot; all Main Objectives must be listed at least once*	Content	Format	Materials	Room	Resources	People

Example, RACI-D

PMA - ETHIOPIA Activity Checklist for Training on Revised Follow-up Interview Tools and subsequent Data Collection					
Activities	**Due date**	**Status**	**Lead/Responsible**	**Collaborators/Implementors**	**Accountable**
A. Prep Logistics and Admin related activities					
Develop the training plan	May 1, 2020	Completed	Survey Ops coordinator	PI1/PI2	Sam
Submit IRB application	May 26, 2020	Ongoing	Survey Ops coordinator	Sam	Sam
Identify the number of participants (REs, Sups, RCs, CS and Admin staff) for each training site.	May 29, 2020	Completed	Abby	Regional Coordinators (RCs)	Abby
Notify training participants	June 1, 2020	Completed	Abby	RCs/Supervisors	Abby
Develop a travel plan for the supervisors to give onsite training to their respective REs	June 10, 2020	Ongoing	RCs	Supervisors	Abby
Prepare a draft letter to FMoH to get permission for the training to be held.	June 17, 2020	Ongoing	Abby	Ms B.	Abby
Book training facility for the Abby ToT (RCs and Sup)	June 25, 2020	Ongoing	Abby	Ms B./Public Health Assoc	Survey Ops coordinator
Purchase PPEs for the training participants (Face mask, hand sanitizer and soap)	May 1, 2020	Ongoing	Abby	Ms B./Public Health Assoc	Survey Ops coordinator
Purchase stationery and other materials (notepads, pens, flip-chart paper)	June 17, 2020	Ongoing	Abby	Mr M./Public Health Assoc	Abby
Purchase Internet Service package for training	June 17, 2020	Ongoing	Abby	Mr M./Public Health Assoc	Abby
Book rental cars for the supervisors and RCS which will be used for REs' onsite training	June 17, 2020	Not yet started	Abby	Ms B./Public Health Assoc	Survey Ops coordinator
Prepare the training materials for Abby site	June 25, 2020	Not yet started	Survey Ops coordinator	Abby/Mr M.	Survey Ops coordinator

Prepare the training materials for REs	June 25, 2020	Not yet started	Survey Ops coordinator	Abby/Mr M.	Survey Ops coordinator
Distribution of material and departure to the field	July 01 and July 04, 2020	Not yet started	Ms B./Mr M.	Abby	Survey Ops coordinator
B. Finance Related Activities					
Produce and submit estimates of expected expense to Public Health Assoc (travel and incidental and other related costs)	June 23, 2020	Not yet started	Abby	Mr W.	Survey Ops coordinator
Produce training participants registration and Attendance sheets templates	June 28, 2020	Not yet started	Ms B./Mr M.	RCs	Abby
Prepare actual payment sheets and make payment facilitation request to Public Health Assoc	June 30 and July 03, 2020	Not yet started	Abby	Mr W. & Public Health Assoc	Survey Ops coordinator
Provide attendance sheets to Public Health Assoc	July 01 and July 04, 2020	Not yet started	Ms B./Mr M.	Mr W.	Abby
Facilitate payments for field team	July 01 and July 04, 2020	Not yet started	Mr W./Ms B.	Public Health Assoc	Abby
C. Training Related Activities					
Finalize questionnaires - English Versions	May 27, 2020	Completed	PI1 E./Ms S./Abby	Survey Ops coordinator	PIs
Finalize ODK forms - English versions	June 20, 2020	Ongoing	ODK team - JHU	ODK prog & DM team - Eth	Ms S./Survey Ops coordinator
Finalize ODK forms - Local Language versions	June 23, 2020	Ongoing	DM team - Eth	Field Supervisor language focal points	Survey Ops coordinator
Develop and finalize training manual	June 20, 2019	Ongoing	Ms S./PI1 E/Abby	Survey Ops coordinator	PIs
Translate training manual and questionnaires	June 24, 2020	Ongoing	Field Supervisor language focal points	PI1 E./Abby	Survey Ops coordinator
Develop training agendas (Supervisors briefing and main RE training)	June 26, 2020	Not yet started	Ms S./PI1 E./Abby	Survey Ops coordinator	PIs
Finalization of training presentations	June 26, 2020	Not yet started	Ms S./PI1 E.	Abby/Survey Ops coordinator	PIs

COVID-19 refresher training for supervisors and RCs	June 29-July 04, 2020	Not yet started	PI1 E./DM team	Abby/Survey Ops coordinator	PIs
COVID-19 refresher training for REs	Round 1: July 06 - 10, 2020 Round 2: July 09 - 14, 2020	Not yet started	Supervisors/RCs	Survey Ops coordinator/Abby/DM team	PIs
Collect/compile parking lots and send to JHU team	June 29 - July 14, 2020	Not yet started	Abby and Neil	RCS/Supervisors	Survey Ops coordinator
Prepare assessments/quizzes for training participants	June 29, 2020	Not yet started	Ms S./PI1 E.	PI1 E./Abby	Survey Ops coordinator/Ms S.
Finalize testing ODK forms - all languages	June 29, 2020	Not yet started	ODK Testing team - Led by DM member2	Field Supervisor language focal points	DM team
Incorporate changes to ODK forms, including translation changes	July 4, 2020	ongoing	DM member1	ODK Testing team - Led by DM member2	DM team