

Piloting

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Outline of Presentation

- ❖ Importance of Piloting
- ❖ Steps in Piloting
- ❖ Implementing the Pilot
- ❖ Things to look for in a Pilot
- ❖ Discussion of questions with respondents
- ❖ Importance of language and translation
- ❖ Documentation and feedback

Piloting

- ❖ Questionnaire is finalized – so what's next?
- ❖ Piloting
 - Trial run of questionnaire
 - Practice asking questions



Importance of piloting

Piloting and testing is extensively used in other domains:

- ❖ Companies test ideas on consumers using rough-and-ready prototypes
 - Amazon tests versions of websites
 - Google Beta
- ❖ Chris Rock, one of America's most famous comedians, tests his ideas often in small venues first (*The Economist*, April 2011)



Importance of piloting

- ❖ Finding the best way to procure required information
 - choice of respondent
 - type and wording of questions
 - order of sections
- ❖ Piloting and fine-tuning different response options and components
- ❖ Understanding of time taken, respondent fatigue and other constraints

Steps in Piloting

ALWAYS allow time for piloting and back-and-forth between team on the field and the researchers

Two phases of piloting

Phase 1: Early stages of questionnaire development

- ❖ Understand the purpose of the questionnaire
- ❖ test and develop new questions
- ❖ adapt questions to context
- ❖ build options and skips
- ❖ Re-work, share and re-test
- ❖ Build familiarity, adapt local terms, get a sense of time

Steps in Piloting

Phase 2: Field testing just before surveying

- ❖ Final touches to translation
- ❖ questions and instructions
- ❖ Keep it as close to final survey as possible.



Implementation of the Pilot

- ❖ Find a population similar to the people in the study, but won't be a part of the study. Example: village/slum close to sample village/slum
- ❖ If respondent type known, then test on same, otherwise pilot to determine best respondent
- ❖ **Protocol**
 - Lots of new questions/ new context – pilot at least 30-40 times
 - Recycling old questions- at least 15-20 times
 - Pilot as often as you add new questions
 - Engage the respondents so that they can discuss the questions
 - If others are piloting your tool, ensure that they do not make their own assumptions about questions

Things to look for during the pilot

- ❖ Comprehension of questions
- ❖ Ordering of questions - priming
- ❖ Variation in responses
- ❖ Missing answers
- ❖ More questions for clarifications? Cut questions? consistency checks?
- ❖ Is the choice of respondent appropriate?
- ❖ Respondent fatigue or discomfort
- ❖ Need to add or correct filters? Need to add clear surveyor instructions?
- ❖ Is the format (phone or paper) user-friendly? Does it need to be improved?

Discuss potentially difficult questions with the respondent

Example 1: Simplify/clarify questions

Do you use Student Evaluation Sheets in your school?

- a. Yes
- b. No
- c. Don't know/Not sure
- d. No response

- ❖ They might not know it by this name (show them a sample)
- ❖ You may need to break it up into several questions to get at what you want
 - Do you have them?
 - Do you know how to use them?
 - Do you use them?

Discuss potentially difficult questions with the respondent

Example 2: Adding options

What are the items you purchase weekly for use in the school MDM program?

- a. Rice
- b. Wheat
- c. Vegetables
- d. Fruits
- e. Oil
- f. Others

During the pilot a lot of respondents said “salt” and we included it as an option explicitly.

Discuss potentially difficult questions with the respondent

Example 3: Ordering questions and priming

- 1) Yesterday, how much time did you spend cooking, cleaning, playing with your child, teaching/doing homework with your child?
- 2) Do you think its important for mothers to play with children?
- 3) Do you think mothers or fathers should be more responsible for a child's education?

If Questions 2 and 3 had come before 1, there could've been a possible bias, order and wording of questions is important

Discuss potentially difficult questions with the respondent

Example 4: Respondent discomfort

Example: “**Do you experience discomfort during menstruation?**”
to an adolescent girl student

Suggestions:

- ❖ Ensure privacy during survey
- ❖ Ensure appropriate kind/gender of surveyor
- ❖ Add surveyor instructions to read out and explain a prepared excerpt before these questions
- ❖ Soothe respondent

Importance of Language and Translation

- ❖ The local language is probably not English, which makes things tricky as to the wording of certain questions
 - But people be familiar with “official” words in English rather than the local language
- ❖ Translate
 - Ensures that every surveyor knows the exact wording of the questions, instead of having to translate on the fly
- ❖ Back-translate
 - Helps clarify when local-language words are used that don’t have the same meaning as the original English

Documentation and Feedback

- ❖ Notes – time, difficulties, required or suggested changes
- ❖ Meetings to share inputs
- ❖ Draft document
- ❖ Keep different versions of the questionnaire



THANK YOU!

Questions?