

Interactive Digital Surveys: Learnings & Implications

What we did

Interactive Digital Surveys are a core component of the User-Centred Community Engagement methodology. They are designed to engage community members quickly and effectively to identify their main needs related to a given problem area. In addition to common survey question types, they also include questions based on smiley scales and interactive questions that allow respondents to provide their answers by tapping on digital illustrations or photographs. The insights from the surveys help the project team gain initial understanding of issues from a large sample of target community members and inform activities in the Co-Creation Sessions.

During the Peru pilot, Interactive Digital Surveys were implemented over the course of 4 days by a team of 4 Data Collectors (1 male, 3 female) across several locations in southern Lima. Initially the surveys were supposed to be implemented for 2 days only. However, two half-days were added to the data collection plan in order to survey more people. This decision was informed by the challenges posed by the project context, which are detailed in the ***What we learned*** section below.

Overall, the team surveyed 59 children aged 6-18 and 36 caregivers of children aged 6-18. In addition to children's age, another sampling criterion was their education status. Because Aprendiendo Unidos is a non-formal education programme for out-of-school children, the survey sample only included out-of-school children and caregivers of children who are out-of-school.

Initially we envisioned that the Data Collectors would conduct surveys by going door-to-door and surveying entire households (i.e., primary caregiver and all children in the household that meet the sampling criteria), as we observed in the previous UCCE pilots. However, as described in the ***What we learned*** section below, this was not possible in Lima. As a result, the field team had to adapt a more flexible approach and use different protocols for each day of survey data collection:

- **Day 1 of field pilot:** field teams were trained.
- **Day 2 of field pilot:** field team went to two public locations - a market and a neighbourhood in front of a hospital - to conduct the surveys. These were chosen because of expected high numbers of Venezuelan and Peruvian populations. They approached and surveyed adults, whether the adults had children with them or not.

It was planned for data collection to take place during the whole day but due to delays in preparation of materials and logistics for survey deployment, data collection lasted about 3 hours that day.

- **Day 3 of field pilot:** 3 Data Collectors went to one Aprendiendo Unidos location and 1 went to another programme location to survey children attending Aprendiendo Unidos sessions and any caregivers they could find at the locations. Data collection took place during the whole day.
- **Day 4 of field pilot:** in the morning 4 Data Collectors went to a market to survey more caregivers, with or without children. Data collection had to be stopped in the afternoon as the Co-Creation Sessions training had to take place.
- **Day 5 of field pilot:** in the mornings 3 Data Collectors went to an Aprendiendo Unidos location and interviewed children aged 13-18, as there were not enough responses from this demographic group collected in the previous days. Data collection had to be stopped in the afternoon as the Report Output Session and the first Co-Creation Sessions had to take place.

Eclipse researchers followed the Data Collectors on two out of the four days for in-context observations.

See the questionnaires used in Interactive Digital Surveys in this pilot can be found here: Caregivers' Survey and Children's Survey.

What we learned

Introduction and consent sections could be streamlined to keep the participant engaged

Data Collectors generally approached people via the following steps:

1. Data Collectors introduced themselves and what the survey is about, introduced the Aprendiendo Unidos programme, screened the person against the sampling criteria, and asked them if they wanted to participate in the survey;
2. If the person met the criteria and agreed to participate, Data Collectors would begin the survey;
3. Data Collectors would then go through the full formal introduction and consent text as detailed in the survey itself.

This sequence took too much time and was largely repetitive, as to start the survey, Data Collectors had to introduce the project and ask for consent for the second time. Particularly in an urban context, where respondents were taking time out of their day to speak with the Data Collectors (including while being in their place of work), the length of this part of the survey - sometimes taking as long as full 5 minutes - was an barrier. Even when Data Collectors paraphrased the introduction and consent text, the information was repetitive and risked losing respondents' interest. While no one interrupted the surveys, a number of participants seemed bored and would get disengaged during the introduction and consent sections.

Urban context was a major factor that influenced the implementation of Interactive Digital Surveys

While in the past UCCE was tested in displacement camps and settlements, where humanitarian organisations had access to a relatively immobile audience, in Lima this was not the case. Early on in the pilot it became clear that there was no 'community' as such that Data Collectors could easily access to survey the target population: out-of-school children aged 6 to 18 and caregivers of children aged 6-18 years old from Venezuela and Peru. Instead, the target population was widely dispersed, mobile and often living and working in less secure areas of the city. This meant that door to door surveying - an approach to Interactive Digital Surveys that we observed in previous pilots - was not possible for the following reasons:

1. There were concerns about safety
2. It was difficult to know which areas/ neighbourhoods to go to to find the target population
3. It was challenging to survey entire households at a time, as people were normally outside their homes during the day

Because of these constraints, the surveying protocol had to be adapted from "1 caregiver and all children 6-18 in a household" and made more flexible (see **What we did** section above for details of protocol used each day).

Even with the more flexible approach to respondent engagement in place, the context still posed a serious challenge in terms of safety and Data Collectors' ability to find respondents who met the sampling criteria. This resulted in the numbers of surveyed children and caregivers being significantly lower than in previous pilots, which took place within displacement camps. Some aspects that could help engagement and practices in urban context are to agree locations and security risks and risk mitigation in advance and to engage with the community ahead of the survey so that people can make their time available. It was also suggested that, rather than surveyors move round to speak to

individuals, that a survey station be setup and allow people to come to that place to complete a survey.

Data Collectors' approach to participant engagement was key to successful survey deployment

Generally, Data Collectors were at ease when engaging with respondents, both children and caregivers. The team approached people on the street, near and inside businesses, cafes and in other public places. Data Collectors made sure that respondents were comfortable (e.g., sat down beside them, set up chairs for them to sit on) and worked hard to establish rapport from the start of the interaction, especially with children. Every person who met the sampling criteria was happy to take part in the survey. Children were interested in participating too, especially once they saw that the survey involved interactive questions where they'd get to tap on the tablet screen. Even when people seemed to become disengaged due to survey length or difficult questions, Data Collectors worked hard to keep their attention by rephrasing questions, providing clarifications and consistently maintaining an energetic and positive attitude.

Images used in surveys were not suitable for all age groups

For the Peru pilot, instead of illustrating steps of a particular user journey and using these as visual stimuli, we opted to use more abstract illustrations with added text. Images used in surveys represented different stages of the project-based learning approach used in the Aprendiendo Unidos programme, different stages of the programme enrolment process, available programme locations, main aspects of the Aprendiendo Unidos programme, and subjects that are or could be available as part of the programme. In children's surveys actual photos of Aprendiendo Unidos classrooms were used to gauge their perception of the classroom environment.

During the surveys run-through in the training, the field team suggested that the illustrations used in the Peru pilot may not be appropriate for all people within the target population. They were especially concerned about how images would be taken by younger children and by people who had no previous knowledge of the Aprendiendo Unidos programme. The field team suggested that the images may be too abstract and difficult to understand and relate to.

This concern was confirmed during Interactive Digital Surveys implementation. For example, some young children seemed to not fully understand what was being asked of them in questions using illustrations and photos, and would at times select the response at random or based on the colour they liked the most. Classroom photographs used in surveys had too many elements, which made it difficult for children to choose what they liked the least

about the images. For some caregivers, some of the illustrations also proved confusing and at times too small to see.

As such, using photographs and illustrations with a lot of text to visualise abstract concepts related to a non-formal education programme did not work well, particularly with younger children. As a result, the illustrations and photos did not have the same engaging effect as we observed in previous pilots. However, in follow up interviews the field team also noted that having some visual elements in the surveys was better than having no visual stimuli at all.

The benefit of using printed photos to explain programme stages was unclear

In an effort to mitigate the issues described above for at least one of the questions - related to different stages of the project-based learning approach, Data Collectors printed out five photographs of Aprendiendo Unidos sessions that roughly represented the five stages and carried the print outs with them to use during surveys. In some cases, this was useful. For example, we observed some Data Collectors showing the print-outs and a verbal explanation of each photo to children who initially struggled to choose an answer in the Interactive Digital Survey. The children would point at a photo on the print out that they liked or disliked, depending on the question, and a data collector would then show them which illustration on the tablet corresponded to the photo they selected. We also observed some Data Collectors showing the print-outs to all survey participants, regardless of whether they struggled to answer the approach stage question. When used in this way, the print-outs did not appear to add any clear value. In some cases, even with the print-outs, participants still struggled to select a response. This was likely due to the photos being in black and white and having many different elements captured in every image.

Survey structure and content were not well-suited for all respondents

Surveys used in this pilot had to be significantly adapted from those used in previous UCCE pilots. This was the first time Interactive Digital Surveys were used for a programme that did not concern an experience of using a built environment (sanitation facilities) but instead had multiple more abstract elements relating to the education modules - something we would expect to be the case for future UCCE pilots. As a result, this pilot provided invaluable initial learnings about adapting Interactive Digital Surveys to a problem space related to a service rather than infrastructure.

We learned that some multiple choice questions had too many response options, which made it challenging for children, especially younger ones, to choose as it was too much information. Other questions were too abstract, e.g., questions referring to giving feedback

and having confidence in Plan International acting on it, and would have benefitted from being rephrased to be more suitable for children. Lastly, some children skipped difficult or confusing questions, as the survey allows for this. For the questions they could not skip, at times it appeared some children selected responses at random or chose the option they best understood. Another example of this issue were some background questions that were not suited for households with several children in different education situations. Each of these difficulties could be dealt with by further adaptation of the survey for children and the ability to test and check the questions with a representative audience of children in advance. Furthermore, it could be useful to have the ability to discard a set of responses if it was felt by the Data Collectors that the child was not able to give considered responses.

Surveys used in this pilot were also built on the assumption that respondents would be able to share opinions about things they disliked about the programme. While the interaction with participants is designed to make it comfortable for them to give honest, including negative feedback, this remains a challenge which varies depending on the cultural context and the subject matter. However, in this case both children and caregivers often didn't have anything negative to say about the programme, in which case the Data Collectors sometimes tried to reframe the questions around 'What can be improved' but this didn't always work. When respondents couldn't decide on a response to such questions, more often than not they would skip the question, if this was possible, or if not, appear to pick an option at random or

Surveys were too long

Similar to the introduction and consent sections, the surveys themselves were too long. The caregivers' survey took on average 17 minutes. The children's survey took on average 13 minutes. This is too much time to sustain the respondents' interest and engagement. In an urban context, where respondents often take time out of their working day to speak to the Data Collectors, this poses a further issue, particularly as participants don't get any compensation for participation.

For younger children in particular, the length of the surveys combined with the volume and diversity of questions used in the survey posed a challenge. Many got tired or bored several times during the surveys.

Most participants showed a good level of engagement during surveys but this seemed lower than in past pilots

Caregivers and children (especially adolescents) were generally well engaged in discussing the topics covered by the surveys. Most people approached by Data Collectors who met the sampling criteria were happy to participate in the surveys and give their opinion. As expected, some respondents were more engaged and vocal than others in voicing their

opinions. This seemed to be informed by the respondent's age, with adolescents usually being more outspoken and engaged. In caregivers the factors that informed a high level of engagement were not clear from observation but engagement levels did not differ between respondents of different ages or genders.

Whereas in previous pilots most children were very eager to take part in the Interactive Digital Surveys, in Peru we did not observe the same level of interest from children engaged in the survey. This could be explained by mobile technology being more ubiquitous in this context and widely used by members of the target population. This could also be a reflection of the urban context in which the surveys were conducted - having a lower population density of people. Lastly, it should be considered that in this pilot the topic matter was specific to a programme which many of the survey participants may not have been previously aware of and as such, less ubiquitous as the Water Sanitation and Hygiene (WASH) focus of previous UCCE Pilots.

Digital Tool was easy to use for Data Collectors and participants

Generally, both Data Collectors and respondents were at ease when using the UCCE Digital Tool on the tablets. All respondents were familiar with the technology and had no problem tapping on responses on the screen when asked to do so. Only in a handful of cases did we observe respondents having trouble tapping on the desired response, which always came down to them tapping too lightly on the tablet screen. In such cases they had to tap several times, each time progressively harder, or a data collector would tap for them. Occasionally the tablet screen was too dim to see well in the bright sunlight.

Data Collectors understood well the difference between interactive and non-interactive questions, and knew when to show the tablet screen to the respondent and when to select the responses themselves. The only issue we observed related to the use of the Digital Tool was that on several occasions some DCs turned the tablet to the respondent when asking a non-interactive multiple-choice question or, with younger children, when asking an interactive question without talking through the options first. In these instances, the respondents ended up reading the available options as the DC did not do it for them, which took some time. Children sometimes were confused in such cases but DCs seemed to work on the assumption that all children they interviewed could read.

Digital Tool and Web Hub sync did not work as expected

A number of changes to language and structure of the surveys were suggested by the field team during Interactive Digital Surveys training. As a result, a number of changes to the surveys had to be made by Eclipse staff in the morning before the deployment. Poor connection resulted in the updated content from the Web Hub not syncing properly with

the Digital Tool. The number of changes being made resulted in two tablets not being checked by Eclipse staff before deployment. It later transpired that these tablets did not sync and old surveys were deployed. This resulted in a loss of 5 survey responses from children across the two tablets.

What this means for UCCE development

Surveys should be developed with greater involvement of field staff

Field staff understand the context and the target population of any given UCCE project better than anyone else. Future UCCE projects will benefit greatly if Interactive Digital Surveys (both questions and visual stimuli) are developed with greater involvement of field staff, including programme specialists, decision-makers and child participation specialists. That being said, the involvement of different stakeholders in survey creation can also result in surveys becoming longer and more complicated while trying to accommodate different priorities of different stakeholders. This risk should be weighed up against the decision to bring different stakeholders on board. In all cases, it's important to remember that Interactive Digital Surveys have a clear practical role to play in the overall methodology, and thus they should not be used to collect information that is not directly related to this component's key objective as part of UCCE. As such, we recommend more thorough iteration of surveys with field and project team input, focusing on key survey questions and acknowledging that shorter surveys may be more effective in urban or other such contexts where participants have less time available.

Pilot surveys before deployment

While this may not be possible in all contexts, it could be beneficial to explore opportunities for piloting future surveys with a small sample of the target population before general rollout. While role play activities in UCCE training do help to catch different issues with the surveys, they are not a perfect substitution to testing surveys with community members. This could be an additional incentive to introduce mock or pilot activities as part of UCCE training as discussed in the UCCE training brief.

Shorten the introduction and consent sections in future surveys

Explore how to strike the right balance between these sections being concise and clear on the one hand, and adequately informing respondents about the programme and collecting their informed consent on the other. One way to approach this could be using bullet-point lists instead of text in introduction and consent sections, allowing for paraphrasing and more natural flow of these sections. Another approach could be expanding UCCE training to

include more information about how to approach respondents and seek consent before starting the survey. In surveys that do not collect personally identifiable information of respondents, it may be possible to reduce consent text or create an abridged consent process that can be completed more quickly.

Develop guidance on building surveys using the Web Hub

With the view to scale UCCE and make its use autonomous for humanitarian teams around the world, it is important to develop clear and simple guidance on how to build surveys using the Web Hub. This guidance should, among other details, include:

- A how-to for linking Web Hub projects to the Digital Tool;
- A clear protocol for making changes to surveys after projects have been linked and for checking surveys before deployment (ie, each survey should be checked from start to finish before the first deployment);
- Guidance on how to determine the minimum number of survey responses that are needed to ensure there is sufficient data to analyse and use in Co-Creation Sessions;
- The number of Data Collectors to recruit, how to recruit Data Collectors, the skills they need and the extent the training needs to be adapted for their level of experience and the participant population they will be working with.
- How to plan for core questions in the surveys to ensure findings can be meaningfully taken into the Co-Creation Sessions.