

DASISH WP3.3a: Fieldwork Management System (FMS)

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Background

- Different survey agencies use different systems and methods to monitor fieldwork
- Availability and quality of fieldwork progress reports vary considerably
- For cross national surveys it is difficult to have timely and accurate picture of fieldwork in all countries
- Also limits understandings of non-response and interviewer effort during fieldwork as analysis often takes place after fieldwork

Goal of WP 3.3a

- Produce a prototype transportable, standardised system to aid central fieldwork control, supervision and monitoring
- Build on SHARE's SMS to produce a mobile application for interviewers to use on the doorstep
- Enable real time reporting and monitoring
- Controlled access to ensure data confidentiality

Activities

- Survey of ESS6 and SHARE fieldwork directors conducted in June 2013
- Informed deliverable 3.6 submitted in December 2013
‘Design of standardised sample management system’
- Outlined the substantive and technical features of the FMS
- Formed the basis of the programming of the prototype, carried out by CentERdata

The specification

- Two linked components – a mobile application and a central database
- Compatible with any phone or tablet, and should work both online and offline
- Should enable interviewers to manage their workload, perform household/respondent selection, and record all contact attempts in real time.
- All information should be synced to, and stored in, a central database - accessible to survey agencies, national teams and central coordinators

Programming and Testing

- Iterative approach to development, with multiple testing stages
- Structured approach to testing, using test case scenarios which mirrored the way interviewers might use the application
- Test cases were grouped to assess Usability; Security; Data transfer, Fieldwork processes and Outputs.
- Issues logged in Redmine

Programming and Testing (2)

- Del 3.6 was very ambitious – so prioritised essential and achievable features
- Focused on:
 - Extended and improved user interface (UI)
 - Ability to add, edit and save information
- Development and testing became more focused on debugging and refining the FMS
- Subsequent testing carried out remotely

Outcome

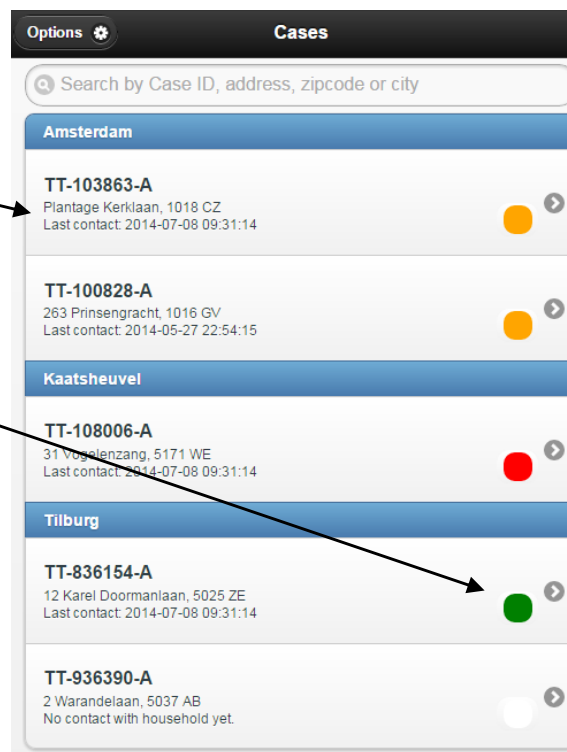
- A prototype mobile application and the basic structure for the central database
- Functionalities available:
 - Secure login
 - Clear overview of cases
 - Search function
 - Respondent / HH selection
 - Recording contact attempts
 - Notes function
 - Neighbourhood Questionnaire
 - Saving a new address
- Also produced a final report detailing progress from Del 3.6 to the prototype developed.

Example 1: Logging a successful contact attempt

One of the first screens gives an overview of all of the cases currently allocated to the interviewer.

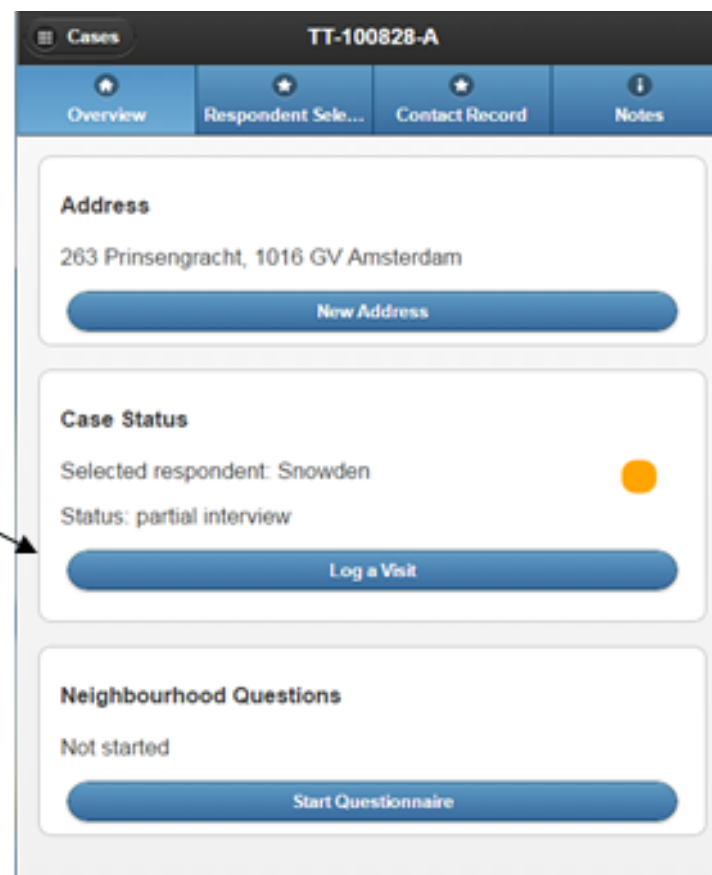
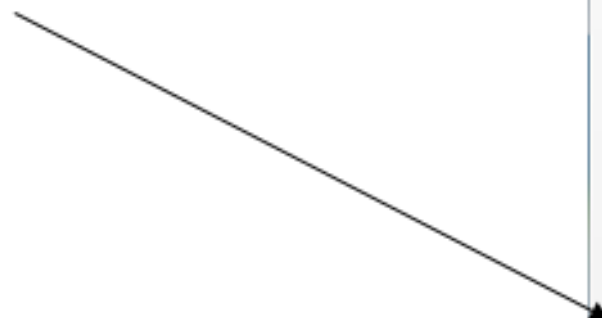
The overview also allows the interviewer to see the date of the last contact attempt

The colour coded system gives a simple overview of the status of the case



Options		Cases
Search by Case ID, address, zipcode or city		
Amsterdam		
TT-103863-A	Plantage Kerklaan, 1018 CZ Last contact: 2014-07-08 09:31:14	Yellow dot
TT-100828-A	263 Prinsengracht, 1016 GV Last contact: 2014-05-27 22:54:15	Yellow dot
Kaatsheuvel		
TT-108006-A	31 Vogelzang, 5171 WE Last contact: 2014-07-08 09:31:14	Red dot
Tilburg		
TT-836154-A	12 Karel Doormanlaan, 5025 ZE Last contact: 2014-07-08 09:31:14	Green dot
TT-936390-A	2 Warandelaan, 5037 AB No contact with household yet.	White dot

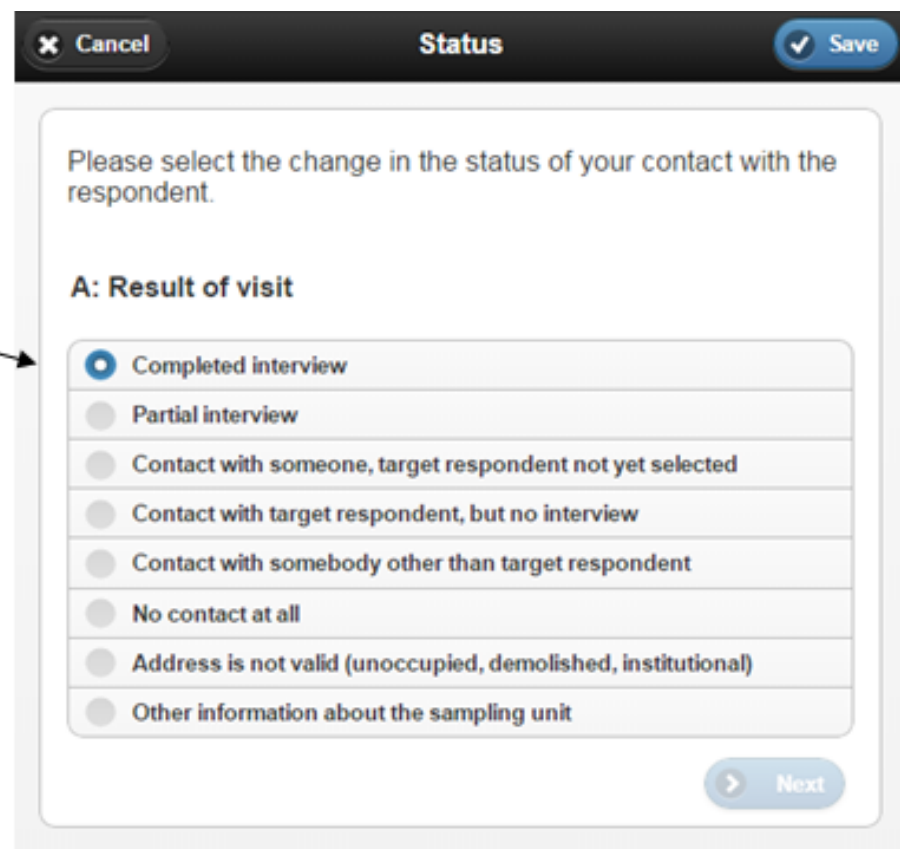
The interviewer can then log a visit by selecting this



The screenshot shows a mobile application interface for a case titled "TT-100828-A". At the top, there is a header bar with a "Cases" label and a hamburger menu icon. Below the header, there are four tabs: "Overview" (selected), "Respondent Sele...", "Contact Record", and "Notes". The main content area is divided into three sections:

- Address:** Displays "263 Prinsengracht, 1016 GV Amsterdam" and a "New Address" button.
- Case Status:** Displays "Selected respondent: Snowden" with an orange dot, "Status: partial interview", and a "Log a Visit" button. An arrow from the text on the left points to this button.
- Neighbourhood Questions:** Displays "Not started" and a "Start Questionnaire" button.

The interviewer will then be able to log the outcome of the visit (in this example, a completed interview).



Cancel **Status** **Save**

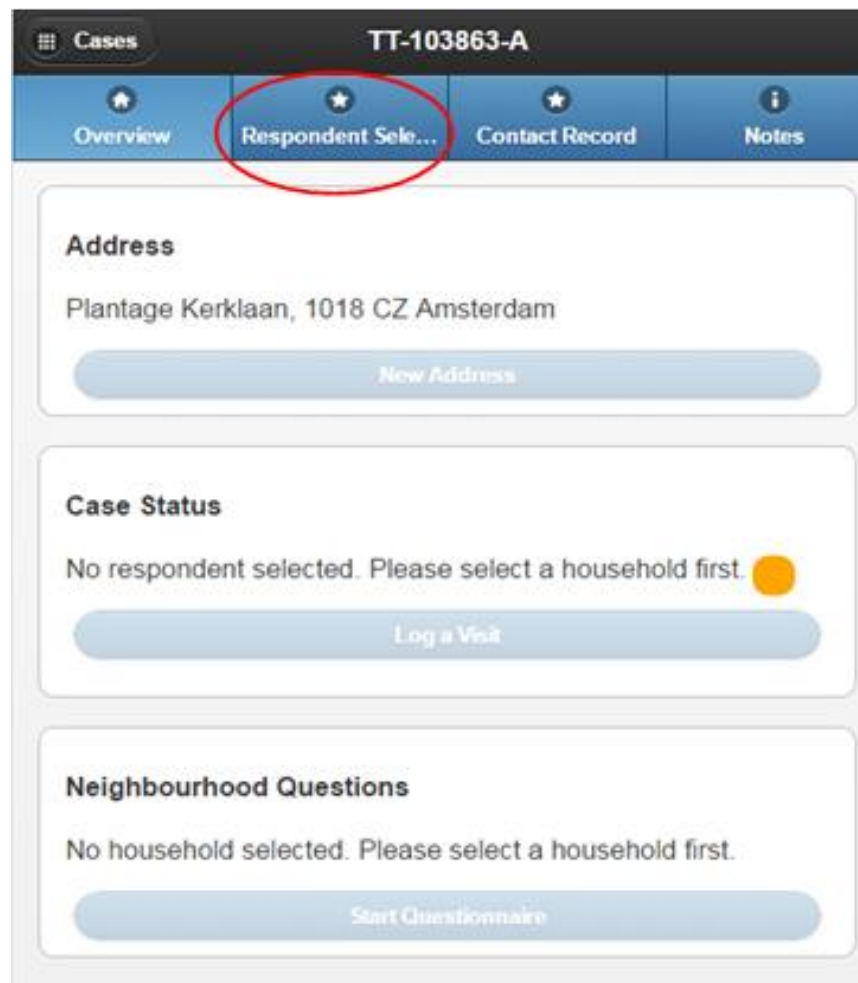
Please select the change in the status of your contact with the respondent.

A: Result of visit

- ☒ Completed interview
- ☐ Partial interview
- ☐ Contact with someone, target respondent not yet selected
- ☐ Contact with target respondent, but no interview
- ☐ Contact with somebody other than target respondent
- ☐ No contact at all
- ☐ Address is not valid (unoccupied, demolished, institutional)
- ☐ Other information about the sampling unit

Next

Example 2: Selecting a household

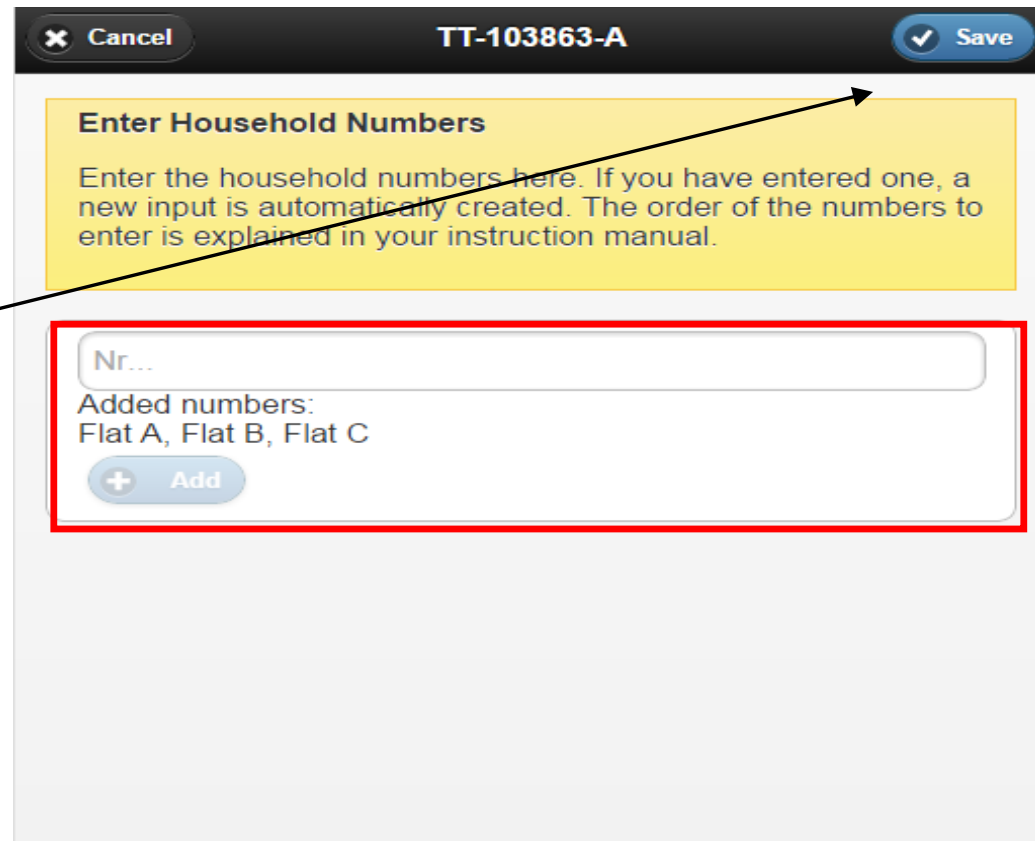
A screenshot of a mobile application interface. At the top, a dark header bar contains a menu icon and the text "Cases". Below this, a light blue navigation bar has four tabs: "Overview", "Respondent Sele..." (circled in red), "Contact Record", and "Notes". The main content area is divided into three sections. The first section, titled "Address", shows "Plantage Kerklaan, 1018 CZ Amsterdam" and a "New Address" button. The second section, titled "Case Status", displays the message "No respondent selected. Please select a household first." next to a yellow dot, with a "Log a Visit" button below. The third section, titled "Neighbourhood Questions", shows the message "No household selected. Please select a household first." and a "Start Questionnaire" button.

<http://cdata21.uvt.nl/slimfms/>

On this screen, the interviewer must enter the household numbers present at the address.

In this example, there are three flats (Flat A, Flat B, and Flat C).

Once entered, pressing the 'Save' button will prompt the selection of one of the households, using the KISH selection method.

A screenshot of a software interface titled "TT-103863-A". At the top, there are "Cancel" and "Save" buttons. Below the title bar is a yellow instruction box titled "Enter Household Numbers" with the text: "Enter the household numbers here. If you have entered one, a new input is automatically created. The order of the numbers to enter is explained in your instruction manual." Below this is a white input area with a text field labeled "Nr...", a list titled "Added numbers:" containing "Flat A, Flat B, Flat C", and an "Add" button with a plus icon. A red rectangular box highlights the input area, and a black arrow points from the text "a new input is automatically created" in the yellow box to the "Nr..." text field.

Cancel TT-103863-A Save

Enter Household Numbers

Enter the household numbers here. If you have entered one, a new input is automatically created. The order of the numbers to enter is explained in your instruction manual.

Nr...

Added numbers:
Flat A, Flat B, Flat C

+ Add

In this example, 'Flat A' was selected,
and the address has been updated
from 'Plantage Kerklaan, 1018 CZ
Amsterdam'
to
'Flat A Plantage Kerklaan, 1018 CZ
Amsterdam'

Cases

TT-103863-A

Overview

Respondent Sele...

Contact Record

Notes

Address

Flat A Plantage Kerklaan, 1018 CZ Amsterdam

New Address

Case Status

Selected respondent: null

Status: (new) appointment

Log a Visit

Neighbourhood Questions

Not started

Start Questionnaire

Future development

Additional features include:

- Convert / translate the app into other languages
 - Provide interviewer statistics
 - Implement checks to prevent user error
 - Ensure compatibility with national sample data
- User testing
 - Pilot study
 - Scoping study

With thanks to.....

Under DASISH, WP3.3 has included multiple collaborators including:

- Sally Widdop (formally of ESS ERIC HQ, UK),
- Lennard Kuijten & Iggy van der Wielen (CentERdata, Netherlands),
- Johanna Bristle (MEA, Germany)
- Verena Halbherr (GESIS, Germany).