



INSTITUTE FOR SOCIAL RESEARCH • SURVEY RESEARCH CENTER
SURVEY RESEARCH OPERATIONS
UNIVERSITY OF MICHIGAN

International Field Directors and Technology Conference Session 9B:

Panel: Adapting Interviewer Training Across Cultures in Developing Countries

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Adapting Training to Other Cultures

- **Planning**

- Assessing needs in host country from afar

- **Settings**

- Be prepared for unique situations

- **Challenges**

- Be ready to deal with the unexpected

- **Lessons Learned**

- Flexibility is often required-



A picture is worth 1,000 words!

Case Studies



Survey Research Operations- University of Michigan

India



SRO Staff:

- Esther Ullman, Project Lead
- Grant Benson, Project Director
- Hueichun Peng, Technical Lead



India- Planning the training

- Involved in three separate trainings to adapt Health and Retirement Study (HRS) components to Longitudinal Aging Study of India (LASI)
- HRS has been replicated in countries around the world, need to assure comparability across sites



India- Planning the Training

- 1. Physical Measures and Biomarkers (2010)
- 2. Cognitive Measures (2014)
- 3. Economic Modules (2014)



Training 1: Physical Measures/Biomarkers

- Train the Trainers: for Pilot in four states in 2010
- Help insure data collection methods were similar



Mumbai, India





Mumbai, India





Different Pace: Auto-rickshaw!





Traffic





Training Site- IPPS





Train the Trainers- LASI 2010





Adapting for Cultural Needs

- Equipment Differences: (breathing, height, vision)
- **Difference in Settings**
 - Privacy
 - Gender matching
 - Team interviewing
- Literacy
- Safety and Sanitation



Different Test: Vision





In the Field- Privacy





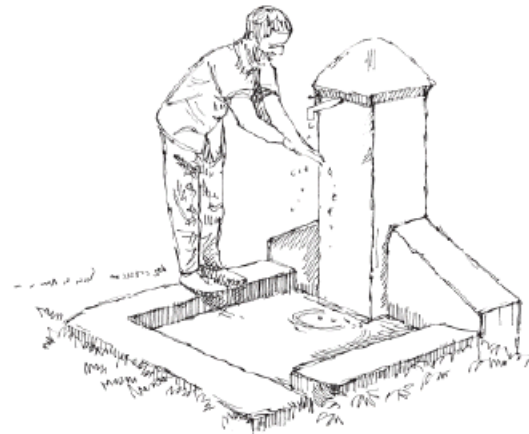
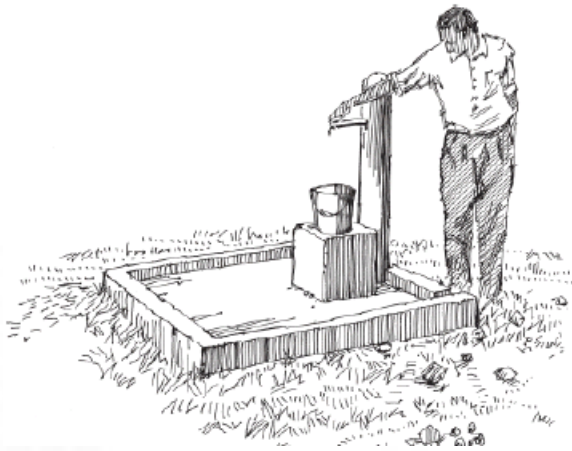
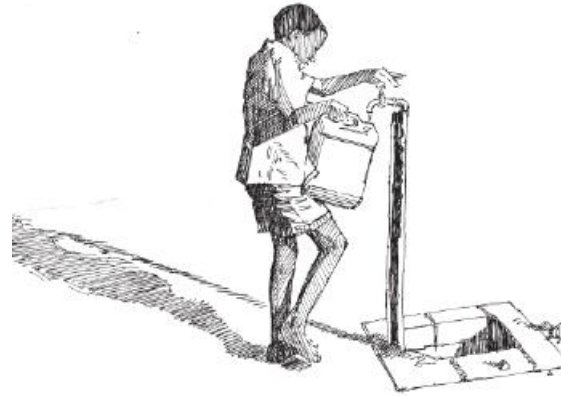
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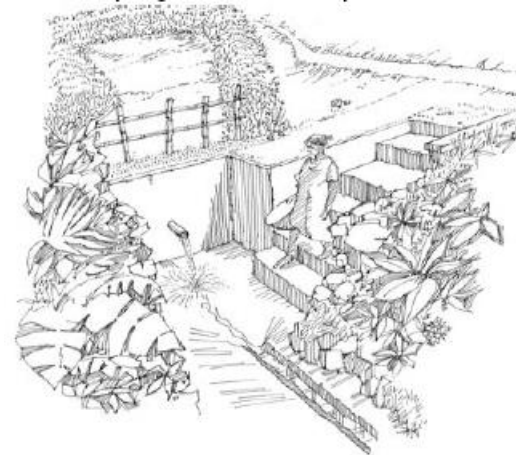
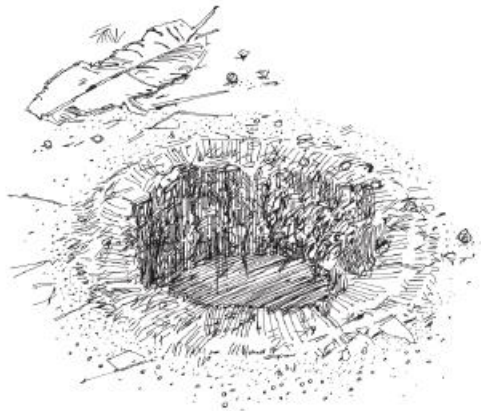




Addressing Literacy

- Use of show cards to help describe sources of water (from SAGE)
- Sometimes words aren't best used to describe situation







Realities of Field Work

- Different safety precautions for biohazards (pinprick for blood drops)
- U.S. use “sharps” containers
- India- burned and buried sharps











Training #2- Cognitive Measures

- Train non-interviewers, medical personnel to use standardized interviewing techniques
- Administer cognitive tests (in the interview) in a consistent manner with other studies in U.S. and elsewhere-



Flexibility: Change of Plans!

- Trainer's visa not approved in time!
- Adapt by using Bluejeans (video-conferencing) at 1:00- 3:00 a.m. US time!
- Shared slides and discussion





Training #3 : Economic Modules

- Mumbai, visa approved in time!
- Teach content of Economic Models- unfamiliar approach for students/staff
- Interviewer Training, not their Trainers





2014: Interviewer Training





Questions answered/debated in native languages





Lessons Learned

- Can do **“pre-planning”** but need to be ready to assess situation when in the environment
- **Remain flexible in best approach!**
- Respect traditions/beliefs of host culture!
- Trade-off: Subject matter expert may not speak language
- Instruments need to be adjusted to culture, so does training approach-



Other examples from U-M Survey Research Operations-

- Nepal (Jennifer Kelley)
- Ghana (Yu-chieh Lin, Gina Cheung, Patricia Maher)
- Japan (Heidi Guyer, Nicole Kirgis)



Chitwan Valley, Nepal

- Jennifer Kelly, SRO- 3.5 weeks in Nepal
- Trained 8 staff to conduct 40 cognitive interviews
- Oversaw the data collection



Challenges

- Power went out intermittently (always print your slides!)
- Could have used longer for training, staff did not have experience in Cog Interviewing we thought they did-



Field Protocols

- Several documents required for the interviewing. In U.S. used table- Nepal spread on ground
- Recording of interviews, needed additional mic's due to street noise







Lessons Learned:

- Using translator had to use fewer colloquialisms (ex. “go with the flow”)
- Prepare for weather- monsoon and heat!
- Decline offers of food and drink in home politely “don’t have Nepali stomach”



Nepal Earthquake Update

- Very little damage in Chitwan Valley
 - All ISER-Nepal staff are safe
 - All households in the Chitwan Valley Family Study are safe
- ISER-Nepal staff's relief effort
 - Northern mountain villages destroyed (Lamjung & Gorkha)
 - Hard to reach – 6 hour drive (due to road conditions) and 3-6 hour hike on foot
 - Assembling and distributing relief packages
 - Working around the clock – within 24 hours had made contact with villages to assess needs
 - Package contains a tent and food supplies for a family of 5
 - Working directly with the manufacture to pick up supplies at the factory
 - Personally delivering packages to villages to ensure the people who need aid the most are receiving it
 - Over 300 relief packages have been distributed





Ghana

- SRO help with established Panel Study (move to automated system PAPI to CAPI)
- Capacity Building- Infrastructure for technical systems (sample management, technical systems)
- Convert technology for interviewing, quality control



Where training occurred

- Koforidua (Eastern Region)
 - Diocesan Pastoral and training centre (Catholic Guest House)





Urban and Rural settings throughout country





Preparation and Planning

- Used the onsite preparation to get familiar with or/and re-train local key staff
 - Train the trainer (2 days)
 - Adjusted training based on Train the Trainer feedback
 - Working and communication style (terms for staff, debating issues, managers wanting to debate issues, changing their minds).
 - Materials
 - Technical systems
 - Strength and experience from both organizations
 - Train in using new technical systems





Collaborating with Local Trainers

- Used the TLs (supervisors) training experience to come up the best strategy to conduct the Iwers training
 - Served as a pilot training
 - Understanding of potential concerns and design changes
 - Time for training sessions
 - Classroom arrangements (language groups- 50 languages, round tables)
 - Selection of teaching assistants



Some Observations

- ***Innovations***
 - Teaching, exercise, workshop, etc.
 - Communication tools: Google chat, Skype, Viber, WhatsApp, E-mail, Call
 - Working schedule: 8am~11pm GMT (3am~6pm EST)
- ***Understanding of differences AND Reacting quickly***
 - Advantages and Challenges of working with the local collaborator (organization, PIs, staff, etc.)
 - Knowledge, working style, experience, flexibility, culture, etc.
 - Pools of interviewers and survey research “industry”
 - Employment, payment, life style, younger, career ladder, higher educ. etc.
 - Quality of interviewers
 - Education, experience, gender ratio, etc.



Japan

- General Interviewer Training
 - Adapt introductions
 - Adapt Persuasion techniques (locked buildings)
 - Re-approaching “refusals”
- Training with a translator, pacing
- Some slides/images in videos “too American”
- Different laws about “pre-load” gathering contact information....





Conclusions from all Sites

- Instrument translation designed to fit the culture and other aspects of training needs to be as well...
- Remember that not only language needs to be translated but video images be aware of “expressions/colloquialisms”



Conclusions

- Consider the trade-off of bringing in a subject matter expert who does not know the language, settings, etc.
- Remain flexible- some situations you can plan ahead for, others you must adjust when they arise-