**African Population and
Health Research Center**

Guideline for Training
Workers to Conduct Remote
Interviews

APHRC Campus, 2nd Floor
Manga Close, Off Kirawa Road
P.O. Box 10787-00100
Nairobi, Kenya
www.aphrc.org

Researchers are increasingly embracing remote data collection

INTRODUCTION

Increasingly, researchers have been embracing remote data collection because of the numerous advantages of the approach. These include the ability to reach diverse participants in far off places at lesser costs, real time data synchronization, and viability in circumstances that do not allow deployment of the traditional face to face interviews.

However, the process is also fraught with challenges such as difficulties by trainers to spot gaps in comprehension and inadequate participation during training for field workers. For successful remote interviewing, better preparation, extra training aids, appropriate medium for communication, and a conducive environment for the trainees' active participation are required.
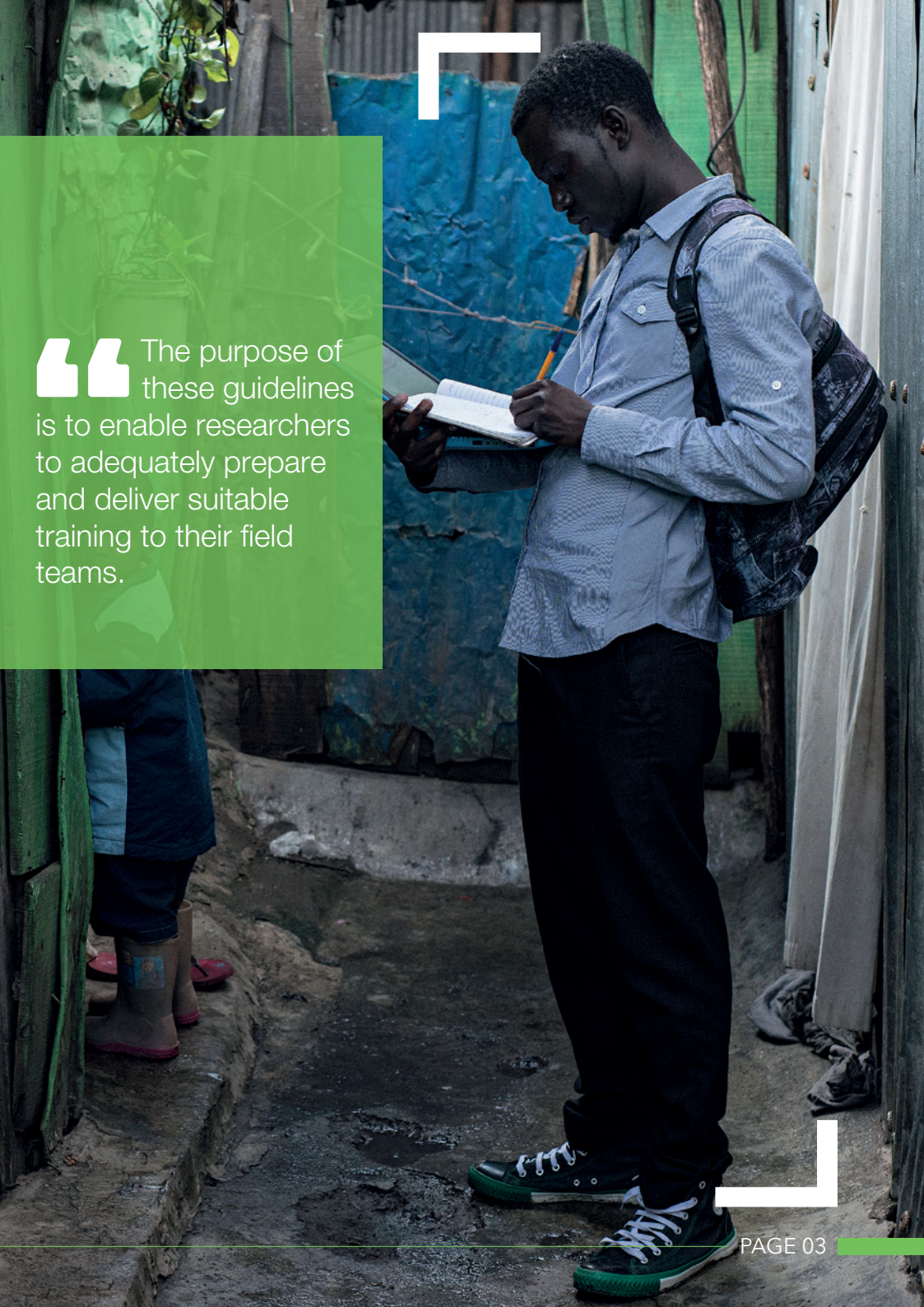
These guidelines will enable researchers to adequately prepare and deliver suitable training to their field teams. This is critical in ensuring that the processes are adhered to, trainees get adequate instructions and quality data is collected. The types of remote interviews envisaged in this document include: telephone interviews, web/online interviews via text, web/online via audio or video, and short message system (SMS).

MANAGEMENT OF TRAINING

There are various considerations in preparing, delivering and evaluation of training for remote data collection. These include:

1. Planning for the training

a. As the facilitators, all researchers should be well-trained on remote data collection, including the technical aspects central to successful remote data collection. Logistical preparations for training of field workers including arrangement for equipment and other resources will be determined by the mode of delivery of the training - remote or in-person. Requisite procurements should be made in good time.
b. Secure training facility for the entire training period
c. Avail training materials to trainees ahead of time
d. Test gadgets beforehand to ensure that they are in good working condition and available for demonstration purposes
e. Consider having more than one communication platform in case one fails
f. Plan and record all training sessions for reference

> ❝❝ The purpose of these guidelines is to enable researchers to adequately prepare and deliver suitable training to their field teams.
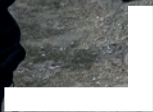
2. *Engaging trainees*

   a. Identify more trainees than needed for data collection in case some of them drop off or are found unsuitable for the job
   b. Consider a maximum of 20 participants for in-person training and a maximum of 40 participants for remote training, taking room size and social-distancing requirements into account
   c. Inform trainees explicitly of the expectations, roles, responsibilities and objectives of the training

3. *Equipment and materials for training*

   a. The equipment required will be determined by the type of remote interview methodology being trained on. Avail the right equipment for demonstration
   b. Employ training aids for better understanding of the material in the tool and use of the technology that will be used for data collection - this may include photos, videos, illustrations etc.
   c. If internet will be required in conducting remote training, ensure an accessible and reliable connection during training

4. *Venue:*

   If the training of field workers is face-to-face, social distancing in training facilities should be observed. If remote, the training room should be equipped with the right communication equipment, power backup, and training aids. Trainees should also consider areas of minimal disturbance during sessions

5. *Tools to be trained on- qualitative/quantitative interviews:*

   a. The length of the tool should determine the overall training duration. It is important to keep the tool as short as possible. Ideally, sessions should be spread out over a maximum of four hours per day
   b. The training should be conducted in the language in which the actual interviews will be happen
   c. Train on the content of the tool and cross-check understanding through quizzes
   d. Make a provision for role-play. Trainees should alternate between roles of an interviewer and a respondent to encourage practical learning

6. *Ethical considerations*

   a. Provide a short briefing on research ethics including consent/assent protocols. (See guidelines on consenting for remote interviews)
   b. Sign non-disclosure agreements with all consultants

TECHNIQUES FOR REMOTE INTERVIEWING:

1. Introduce yourself, the organization you represent and its work.
2. Try to establish rapport. Refrain from ice-breakers of sexual, gender, political, cultural or religious nature as they may be offensive.
3. Confirm identity of the participant- using name, age, address and any prior information provided.
4. Seek informed consent and affirm it in the recommended format as follows:

   "Mr/Ms xxxx, do you confirm that the study objectives and procedures have been explained to you, that you understand the risks and benefits, and you have voluntarily agreed to participate in the study".

5. Inform the participant that the affirmation of consent will be recorded. (See guidelines on consenting for remote interviews.)

6. Understanding the nuts and bolts of the tool:

   a. The interviewer should familiarize themselves with the questions and adhere to the flow as detailed in the tool as much as possible. The exception here is for qualitative interviews, where the respondent might be allowed to give a narrative without being interrupted, or the interviewer might change the question to maintain better flow.
   b. Maintain the format, no paraphrasing as the meaning might change. Interviewers are often tempted to change questions to leading ones, this should be avoided. However, this is different from probing, or helping a respondent to remember an event or dates etc.
   c. Explain all the technical terminologies.
   d. Understand the response options. Some questions will require one response and others, multiple
   e. Open ended questions may require probing for an adequate answer from the respondent.
   f. Do not express judgement in any form even when an answer is surprising to you, or the respondent declines to answer a particular question,
   g. Demonstrate empathy where needed such as when talking about unpleasant events.
   h. Seek clarification on unclear responses or repeat the question.

7. Ensure all interviewees actively participate in focus group discussions. You can only pick this out if you are actively listening

8. Allow scheduled and unscheduled breaks if needed by the respondent

9. Assess the mood, voice tone and level of attention regularly, and ask questions

QUALITY ASSURANCE:

While all data collection activities face quality issues, remote data collection issues are more pronounced because of the fact that the interviewer and respondent are not as engaged as it happens in a face-to-face interview. To ensure quality, only train a manageable group at a time in terms of numbers, and provide adequate training time, roughly double that needed for face to face interviews with multiple breaks. Use the pilot exercise to estimate the realistic duration a single interview takes. If recording, seek permission from the Trainee to record and ensure the device is working properly. As part of quality assurance, developing and using a field manual is always recommended.

Piloting of tools:

The tools and the technology being used must be tested in real world environment through a well-planned piloting activity. Each trainee should have an opportunity to conduct at least one interview. This also provides an opportunity to identify and select the final set of interviewers to be used and drop those not suitable.

Training evaluation:

Ensure that trainees are evaluated on their understanding of the objectives of the study, the use of technology being used, and the tool content.