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Education facility survey for {Study name}

Enumerator Manual

Example version

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**Note to user**: The present document constitutes an example of an enumerator manual for a survey to be implemented in education facilities. Because of its similarity, its content is based on the example manual for household survey enumerators. As with household interviews, for this example the interviews are conducted face to face with the help of paper questionnaires and are entered into a computer at the end of each workday.

The text contains notes similar to this one with suggestions for adapting this document according to the characteristics and methodologies of each study.

# INTRODUCTION

**Note to user**: This section contains a brief description of the program that is being evaluated, and must include the objective and the role played in the impact evaluation. The following text is included by way of example.

On {date} the program {program name} was created. Its objective is {general objective of the program} and its method is {type of program intervention}. The program will work with {facilities; schools; healthcare providers; etc.}.

The program will be implemented in {number of facilities, or as appropriate} and {beneficiaries and eligibility criteria} are eligible for the benefits of the program.

The program {program name} consists of {description of the benefit}.

The current study is part of the impact evaluation activities for the program, and its main objective is to obtain information that enables {the construction of a baseline for the program; the implementation of impact evaluation etc.}.

This document is a reference tool for enumerators to use in the application of the education facility survey, and it contains the necessary concepts and procedures to carry out this task. This manual must be used both during training and fieldwork until the survey fieldwork is completed.

# GENERAL ASPECTS OF THE SURVEY

## MAIN OBJECTIVE

**Note to user**: Indicate what the main objective of the survey is, for example “to obtain information about the educational facilities and teaching and management prior to the program intervention, in order to have a a baseline for evaluating the program.

## WHO WILL BE SURVEYED?

**Note to user**: This section must clearly state what educational facilities are involved in the survey, indicating any possible exclusion. In the facilities, different types of personnel and students may be interviewed depending on the type of information required. In this survey, for example, the information must be provided by the school’s principal or by whomever the principal designates for this purpose, and by the people specifically indicated in each of the sections.

**Note to user**: Please indicate the area(s) where the survey will be conducted, indicating the zones that are excluded if this is not evident.

Example: “The survey will cover almost all the national territory, excluding the departments of Alto Paraguay and Boquerón, whose populations represent less than 2% of the country’s total population.”

## GEOGRAPHIC SCOPE

## 

## DURATION OF THE SURVEY

Data collection will take place between the months of {start month} of {start year} to {end month} of {end year}.

## EVALUATION TEAM

**Note to user**: This section must specify the organization of the evaluation team planned for the survey, ideally including an organizational chart and a description of the positions. In terms of the fieldwork teams, the organization can be modified to accommodate additional personnel.

The example text included here shows the organization recommended for this type of surveys.

An evaluation team organizational structure has been established in order to properly conduct survey activities. The following diagram shows the positions and roles and organizational structure of this team:

Survey director: this person is responsible for the management and implementation of all phases of the survey activities. He/she also evaluates, monitors and supervises the development of the survey in an integral way.

Fieldwork team leader: this person is directly responsible for the entire field operation. He/she is in charge of delivering and receiving the necessary documents and materials for the execution of the survey to the supervisors. He/she must also provide the fieldwork teams with ongoing support, evaluating, monitoring and supervising their tasks, and ensuring that material and financial resources are always available for them to properly carry out their work.

Data processor: this person is responsible for the data entry program and the proper functioning of all its related aspects, with the aim of ensuring that consolidated data is available at a central level, both to remotely monitor the quality of the information collected and to prepare the final database.

Fieldwork teams for data collection and loading: each team will be composed of a supervisor, a data processor, three enumerators and a driver.

Supervisor: he/she is responsible for monitoring, supervising and supporting the work of the enumerators in the field, so that they can fulfill of their roles.

Enumerator: he/she is responsible for capturing information through direct interviews with personnel and students from the education facilities.

Data Processor: his/her roles include the coding and inputting of data. Like the enumerator, he/she works under the orders of the team supervisor.

# THE ENUMERATOR

## IMPORTANCE OF YOUR WORK

The enumerator is the person in charge of one of the most important phases of the investigation: data collection. Your task consists of collecting reliable information from the education facilities involved in the survey, through direct interviews with the directors, personnel and students of the facilities, completing the questionnaire that is provided. In so far as the data is exact and corresponds to the reality of the situation, the results will allow for accurate conclusions. The preparatory work for the survey, the established protocols and the techniques used will not be successful if the enumerator does not perform his or her work with perfection and precision.

## QUALITIES REQUIRED TO BE A GOOD ENUMERATOR

The enumerator’s work requires particular personal conditions, such as: sociability, rigor, flexibility to adapt to the different situations that can arise during the interview and a strong sense of responsibility. Total discretion and seriousness are also required, as he/she has access to sensitive information that cannot be disclosed without violating the confidentiality guaranteed by the statistical law.

The enumerator reports directly to the fieldwork team supervisor and indirectly to the people in charge of the survey.

## ENUMERATOR’S OBLIGATIONS

The obligations that an enumerator must fulfill are of great importance, and their strict fulfillment and adherence will ensure that the information collected is of high quality and reflects the reality of the population’s living conditions. As an enumerator, your main obligations are detailed below:

* Punctually attend each day of the training course;
* Be fully versed in the content of the “Enumerator Manual” so as to perform your job in an efficient manner;
* Comply with the established work schedule. Interview hours will be established so that you can efficiently fulfill your objectives;
* Carry an identity pass, the Enumerator Manual and the material necessary to carry out your work at all times;
* Abide by the instructions contained in the manuals and protocols that will be handed out and by those established by the field supervisor during the distribution of documents, assignment of work positions, and established work team meeting times;
* Consult with your field supervisor regarding any difficulty or special case that arises during field operations;
* Do not, under any circumstance, solicit or accept any sort of compensation from the people interviewed;
* Personally carry out your work and do not ask to be accompanied by people not involved with the survey, in order to guarantee the confidentiality of information;
* Conduct interviews with the sole and exclusive aim of obtaining the information required by the survey. This means that taking advantage of the visits for purposes other than those related to the investigation (purchasing, selling, publicity, surveys for other entities, etc.) is prohibited;
* Return to visit the facility up to three times if for any reason you have not been able to contact the person responsible, in each case informing the supervisor of this situation;
* Guarantee the quality of the information collected in the survey questionnaires;
* Write in print with uppercase letters in the corresponding spaces, to avoid confusion or distortions of information;
* Use a blue pen to fill in the questionnaires.

## ENUMERATOR’S ACTIVITIES

In order for you to properly carry out your tasks, daily activities must be divided into three phases: before, during and after the interview.

The tasks you must complete in each of the three phases are detailed below:

|  |  |
| --- | --- |
| **WHEN?** | **WHAT IS THE TASK?** |
| **BEFORE THE INTERVIEW** | Verify that all of the necessary material for collecting the information has been provided and is complete. |
| Make contact with the facility authorities to schedule the contact visit. |
| **DURING THE INTERVIEW** | Enter the geographic location and the facility identification data in the questionnaire. |
| Agree to the facilities that the field supervisor assigns, without making changes or replacements. |
| Identify the appropriate informant and introduce yourself as the enumerator. |
| Request a signature of informed consent, either reading the text of this informed consent or ensuring that the person reads the text of this informed consent. |
| Carry out the survey, interviewing the principal or the person who he/she designates based on the information required in each section of the questionnaire. |
| Say goodbye and thank the informant for his/her collaboration. |
| Return as many times as necessary to obtain any missing information or to verify cases of inconsistent information. |
| **AFTER THE INTERVIEW** | Review all of the content of the questionnaire, which must contain COMPLETE and CONSISTENT information. If this is not the case, the informant must be interviewed again to obtain the required information, before submitting the daily workload to the field supervisor. |
| Inform the field supervisor about the daily work activities and any incidents that arise in the field. |
| Submit the properly completed questionnaires to the field supervisor. If the interview is incomplete, report the time and day of the next meeting with that facility. |

## WHAT AN ENUMERATOR MUST NOT DO

An enumerator must never do the following:

* Assume or invent responses;
* Delegate roles to people not authorized by the institution;
* Divulge the information obtained, thus violating statistical secrecy;
* Argue with the informants;
* Ask questions other than those in the survey;
* Promise benefits as a result of the survey;
* Introduce yourself improperly;
* Request or accept any remuneration from the people interviewed under any circumstances;

As far as possible, the enumerator should avoid having other people present during the interview, unless the principal or interviewee requires it. If you see that the person is very busy, you can offer to come back at another time.

## 

## ENUMERATOR – SUPERVISOR RELATIONSHIP

* The enumerator reports directly to the field supervisor ;
* The supervisor will give additional instructions when necessary;
* The enumerator’s work is monitored and reviewed by the supervisor, who in turn keeps the regional manager informed ;
* Enumerators must communicate with the supervisor as soon as possible with respect to any questionable situation that makes it difficult for them to perform their job;
* The enumerator will receive any material needed from the supervisor;
* The enumerator must submit all of the surveys conducted to the supervisor on a daily basis ;
* Once the work is finished, the enumerator must submit all unused materials to the supervisor .

## DATA MANAGEMENT AND THE ENUMERATOR

As described above, data entry for this survey will take place directly in the field, using a program that incorporates a set of validations for the information entered, so as to provide an early evaluation of the quality of the data collected. This makes it possible to return to the information source if necessary to complete missing information or correct any inconsistencies.

This allows the team as a whole to improve the quality of the data collected, both due to this evaluation with a standardized tool and due to the dynamic generated within the evaluation team in the daily meetings held by the supervisor to provide feedback for the enumerators regarding any problems observed.

## ENUMERATOR’S TOOLS AND MATERIALS

As an enumerator, you will receive the following materials in order to carry out your work:

|  |  |
| --- | --- |
| **WHAT IS THE MATERIAL?** | **HOW it is IT USED?** |
| Enumerator Manual | * Document that contains the definitions and general and specific instructions for the completion of your work. * This document is given out during the training course, so that you can follow the manual and use it as a reference guide for the survey. |
| Pass | * Document that identifies and accredits you as an enumerator of the Facility Survey, and which must always be carried on your person. |
| Survey Questionnaires | * Documents that you will take with you to collect the survey data. |
| Consent forms | * At the beginning of each interview you must ask the head of the facility or his/her representative to give consent for the interview. The consent form must be signed to indicate approval. |
| Copy of the map of the survey plan, and information about its identification and location. | * To identify the geographic location where the work will be carried out. |
| Plastic bag | * Protection for the survey material. |
| Blue pen to complete the questionnaire. | * Needed to enter the information provided by the interviewees. |

# THE INTERVIEW

**Note to user**: The content in this chapter should not differ significantly from one survey to another, since the interview technique to be used does not change.

## WHAT IS AN INTERVIEW?

An interview is one of the most valuable techniques in socioeconomic research, as it allows us to understand the problem being investigated through a direct assessment of the population under study. It consists of the application of a series of questions to the people being interviewed, carried out in the form of a dialogue.

To conduct the interview, the survey questionnaires provided will be used as a guiding instrument for asking the questions, collecting the necessary information and recording the answers received from the different interviewees.

## WHO WILL PROVIDE THE DATA IN THE SURVEY INTERVIEW?

The questionnaires contain specific instructions regarding which members of the facility can provide information in each section. In each case, it is expected that the answers will be provided directly by the principal or by whomever he/she designates, to the extent of their knowledge of the requested information.

## HOW IS THE INTERVIEW CONDUCTED?

The interview has three very important phases: Introduction, Development and Completion.

### Introduction

As an enumerator, this is your first contact with the members of the facility and, when conducted appropriately, it allows you to ensure the success of the interview. Your initial actions and words are of vital importance to gain the cooperation of the interviewee.

It is very important that:

* Your clothing is appropriate for the area in which the work will be carried out, as this will create respect, trust and acceptance on the part of the interviewees.
* A good introduction is conducted. The first thing you must do is say your name and show your pass that authorizes you to conduct this task. The pass must indicate your name and the institution you work for.
* You explain motive for the visit and the objectives of the survey.
* You explain that there is a consent form that must be signed by the principal of the facility or his/her representative to authorize the interview.

Enumerator: please read the following example carefully, as it will serve as a guide for your own introduction:

“Hello, my name is ….. I am an enumerator from … which is conducting a Education Facility Survey in your area and throughout the entire country. Our goal is to collect information about the activities of this facility and how they are conducted. The information that you can provide us is very important for this study and we hope that you would like to participate. If you agree, I would like you to read this consent form, and if you are satisfied with its contents, I will ask for your signature as a sign of approval.”

Make sure to take the following advice into account:

* Greet the interviewee cordially and conduct the interview with respect, creating an atmosphere of trust at all times.
* In order to establish effective contact with the interviewee, it is not advisable to open with phrases such as: “Are you busy?” “Could you give me a few minutes?” or “Could you answer some questions?” Questions like these are likely to receive a rejection. It is best to use a method that invites acceptance, such as, “I’d like to ask you a few questions...”
* Politely persist when you receive a rejection, and explain that the information they are providing is confidential and only for statistical purposes.

If for any reason you are accompanied by a member of the supervision team, he/she must introduce him/herself at the same time as you, that is to say, at the start of the interview. These introductions play a very important role in people’s willingness to answer the questions.

Before beginning the interview, it is important to emphasize the statistical secrecy of the data, explaining that there is a law that prohibits the indiscriminate use of the data provided. It must be explained that names will not be published under any circumstances and that all of the information collected will be used to prepare a document based on statistical data.

### Advice for conducting the interview

The following suggestions will help you to obtain the information needed to complete the questionnaire:

* Treat people with respect, regardless of their social condition, age, occupation, etc.;
* Take control of the interview with an attitude of seriousness and respect. Avoid making comments that are not directed solely at encouraging the interviewee to provide the requested information;
* Maintain a natural and relaxed appearance when asking the questions;
* Read the entire question exactly as it is written in the questionnaire, and follow the order of the questionnaire. Changes in the type of language used can alter the meaning of the question. If the interviewee does not understand the question, you must repeat it slowly and clearly;
* Make sure throughout the entire interview that the order of the questions is not changed, and skip questions when necessary according to the indications of the arrows in the questionnaire;
* If there are questions that the interviewee does not wish to answer, continue to the next question. Once all of the questions have been asked, politely try to obtain the missing information;
* Do not assume answers. If the person being interviewed is unsure, remains silent or answers “I don’t know,” repeat the question until obtaining the required response, but do not under any circumstances make assumptions about the answer. In these cases, try to give the interviewee more confidence and make him/her feel more comfortable;
* Inquire further if there are incomplete or unsatisfactory answers. In these cases, some additional questions must be asked with the aim of obtaining an appropriate answer. This procedure is known as “Prodding” or “Probing.” To do this, neutral words should be used rather than words that encourage the interviewee to give particular answers;
* Do not react with surprise, approval or disapproval, in terms of tone of voice or facial expression, to the interviewee’s answers;
* Be careful that the interview is not influenced by your personal opinions. Be brief in your explanations and limit yourself to listening to the answers of the person being interviewed;
* Do not rush the interview. The questions must be asked slowly to ensure that the interviewee has understood what he/she is being asked. Once the question has been asked, he/she must be given the necessary time to think; if he/she feels rushed or is not given sufficient time to formulate his/her own opinion, it is possible that he/she will respond evasively;
* If you believe that the person being interviewed is answering the questions without thinking in order to finish the interview quickly, it is a good idea to explain to him/her that there is no rush and that the answers are very important for the research;
* Guide the interview. If the interviewee gives answers about other topics or issues that do not have anything to do with the interview, it is not a good idea to interrupt him/her. Avoid talking about topics related to politics, religion or financial problems. At the first opportunity, kindly explain that this is not your assignment, and that you have little time to finish your work, always trying to maintain a good atmosphere during the interview;
* Avoid receiving food from the people you interview; remember that you do not have much time to conduct your work;
* Direct interview. It is important that the people indicated in each section of the questionnaire are interviewed. If they cannot be found at the time of the visit, request an appointment to come back at a time when they can be interviewed. Although there are parts of the questionnaire that can be filled in by third parties, there are other parts that require the indicated person.

### Completion of the Interview

Once the interview is completed, the information in the questionnaire should be reviewed thoroughly to ensure that it is complete, without incorrect annotations or omissions. If any questions have been omitted or are incomplete, or in any other case that merits it, the people interviewed will be asked these questions again, with the aim of obtaining the information.

Before leaving the facility, thank the people interviewed for their collaboration and kindly say goodbye. Tell the informants that if there is any inconsistency in the answers to the questionnaire, they will be visited again and their collaboration will be requested, and that the supervisor may also visit the facility to verify your work.

Read the following example carefully, as it will serve as a guide for saying goodbye:

“Thank you for your collaboration in this survey...,” “for the time you have given us in this interview...,” “if we need to complement this information, **we will visit you again**...” etc.

The survey questionnaires will be submitted to the field supervisor at the end of the day so that he/she can check their contents and transfer them to the data processor.

# GENERAL INSTRUCTIONS FOR USING THE QUESTIONNAIRE

**Note to user**: when adapting the manual, the sample images used must be changed for the definitive questionnaire. The type of instructions should not be modified if the question complies with the best practices on the subject. Do not forget that these instructions are for an interview that will use a paper questionnaire. These instructions must be reviewed if the survey is to be carried out via an interview guided by a computer questionnaire.

## THE QUESTIONNAIRE: Structure Analysis

The questionnaire has a format that is designed to facilitate its use in the field and to reduce the risk of errors in individual pieces of information in order to ensure the quality and correct entry of the data.

The quality of the information depends largely on:

* Reading the survey questions to the interviewee **exactly as they appear in the text**;
* Asking all **questions in the order** in which they appear in the questionnaire;
* Recording answers with **clarity and precision**, without anticipating any answers or presuming that they are obvious, ridiculous or repetitive;

We will now briefly review the structure of the questionnaires, which have two parts: the front page and the main body.

Identification data is largely entered on the **front page**. This includes :

* The identification of the questionnaire form with pre-established codes;
* Geographic location data (region/state, province, municipality, town, block number, georeferencing data, address, etc.);
* Details about the facility and its principal;
* The enumerator’s and supervisor’s basic information;
* Other information about the interview (date, time and duration of the interview, language, visit number, etc.);
* Other data (results, observations, etc.).

The **main body** consists of various pages that contain the specific information provided by the interviewee. It is divided into **sections** by content.

Each **section** of the questionnaire is identified with a **title**,which facilitates the respondent’s task by describing the content of the block of questions. Therefore, the respondent can anticipate the “topic” of the following questions, which helps him/her to find information, and also reduces uncertainty regarding “what is coming next.”

Also, in each **section,** the subject who must answer the questions is identified underneath the title.

## TYPES OF QUESTIONS

Within each **section**,thequestions are related to the topic indicated in the **title**. The types of questions are as follows:

* Questions in which the response alternatives **MUST NOT BE READ**, where the enumerator must read the questions and **wait for a spontaneous answer** from the interviewee.
* Questions in which the response alternatives **MUST BE READ**, where the enumerator must **INQUIRE**, pausing after reading each alternative to give the interviewee time to understand and respond.
* Questions that the enumerator **COMPLETES BY OBSERVATION** .

## TRAJECTORY OF THE QUESTIONNAIRE

It is important to take into account that the questionnaire design employs a **flow of questions** (trajectory of the questionnaire) that must be followed rigorously, not **skipping** any question or making inappropriate inquiries.

## SKIPPING

The **skips** are placed in the questionnaire to deliberately alter the flow of questions.

The **skips** are indications for the enumerator, or questions asked prior to another question, that are designed to avoid asking questions to people who do not fit the predefined criteria: age, sex, educational level, etc.

The skips are used in the questionnaires to save time, as they determine whether or not subsequent questions will be asked.

The symbol **►** indicates that a question should be skipped or that the order of questions in the questionnaire should be altered. Whether or not a question is skipped is defined according to the response that the interviewee gives in the previous question. For example: if the person answers NO in question 1.10, they will skip to question 1.13.

Even when you, as an enumerator, feel familiarized with the questionnaire and are confident in your acquired experience…

**…YOU MUST ALWAYS READ THE QUESTIONS AND RESPECT THE SKIPS.**

Otherwise, you run the risk of presuming that you already know the next question or answer and you could potentially accumulate systematic errors.

Before some questions there is a brief text in **uppercase letters**; these are instructions for the enumerator and must not be read to the interviewee .

## HOW TO FILL IN THE QUESTIONNAIRES

Abide by the following when completing the questionnaire:

* In all cases, indicate the code corresponding to each answer;
* For open questions or when a particular option must be specified, print answers in uppercase letters;
* Write complete words instead of abbreviations;
* Write only a single letter in each cell, without exceeding the limits, and starting from left to right;
* Leave one cell blank between one word and the next;
* Record numbers from right to left, writing a single number in each cell;
* Use a blue pen;
* If necessary, make corrections by crossing out and rewriting the correction next to it (never erasing);
* Practice and familiarize yourself with the questions, since greater familiarity will make for a more fluid interview;
* If time must be taken to calculate something, write down the information needed to do so and make the calculation immediately after leaving the facility instead of taking the time to make calculations during the interview;
* Do not leave any questions unanswered unless you have been instructed to skip the question. Questions left blank are difficult to answer later. It could be assumed that you forgot the question, which will generate subsequent confusion;
* Record the answers immediately;
* Review the entire questionnaire before leaving the facility to ensure that it has been completed fully and correctly.

**Examples: Multiple occurrence tables (rosters)**

In some sections, multiple occurrence data can be entered. An example is data on all of the teaching faculty.



**Single occurrence items**

Non-spontaneous single response code items, for which the response options must be read aloud to the interviewee. The options are written in lowercase letters.



Spontaneous single response code items, for which response options are not read aloud to the interviewee. The options are written in uppercase letters.



Single non-coded response items: the enumerator must fill in the box by writing the interviewee’s answer.



**Multiple response code items.**

**Non-spontaneous.**

* The enumerator must read each of the options and write the corresponding code in the right-hand column (1 YES, 2 NO).



**Multiple response code items. Spontaneous.**

* The enumerator must wait until each one of the answers is mentioned, and record the answers in the boxes marked FIRST, SECOND and THIRD in the order in which they were mentioned.



**References in the text**

**Text in UPPERCASE LETTERS**

None of the text in uppercase letters should be read aloud.

The instructions for the enumerator about how to fill in the questionnaire or formulate a particular question are indicated with uppercase letters.



If the question requires the incorporation of data, the enumerator will insert this data before asking the interviewee the question. Missing data is indicated in brackets and with UPPERCASE LETTERS. For example: [FUNCTION]



In the case of questions with spontaneous responses, the possible answers are indicated in UPPERCASE LETTERS, and they must not be read aloud.



**Instructions for skips between questions ►**

* **Skip to another item**



* **Skip to another question**



# SPECIFIC INSTRUCTIONS FOR FILLING IN EACH PART OF THE QUESTIONNAIRE

**Note to user**: With respect to the specific instructions for filling in the questionnaire, the manual must contain explanations about the questions or concepts that could be controversial and/or ambiguous, but a detailed explanation of all of the questions and possible answers is not necessary. Too many explanations could result in a tool that is not very practical for use in the field.

The adaptation of the questionnaires and this manual must be validated in a pilot test, during which the definitive elements that merit further explanation will surely emerge.

The manual must be adapted only once the final version of the questionnaire is available.

The details in the explanations for each section illustrate the potential difficulties that could arise during the interview, based on previous experience in similar surveys. However, the relevance of this specific content must be evaluated for each case depending on the questionnaires and the specific methodology and protocols.

The education facility survey questionnaire consists of the following sections:

* FRONT PAGE OF THE QUESTIONNAIRE
* SECTION 1: PRINCIPAL OF THE FACILITY
* SECTION 2: CHARACTERISTICS OF THE FACILITY
* SECTION 3: YEARS
* SECTION 4: LIST OF TEACHERS
* SECTION 5: LIST OF STUDENTS FROM GRADE/YEAR {xx}, CLASS "A"
* SECTION 6: SELECTED TEACHER
* SECTION 7: SELECTED STUDENT

In the following pages, explanations and recommendations for filling in each of these sections will be provided.

## 

## FRONT PAGE OF THE QUESTIONNAIRE

This is the initial section, which will largely be completed with information about the education facility, the geographic location of the facility, contact details and information about the result of the interview provided by the enumerator.

The front page has four areas: the first is to indicate the name of the facility and the education facility identification number; the second is to indicate the address and georeferencing data of the facility; the third is for the type of facility, the principal’s name and contact details; and the fourth is to record the result of the interview and information about it.

**Name and identification number of the education facility**

In this part of the questionnaire, the name and identification number of the facility must be entered. The supervisor will provide this information.



**A.- Exact Address of the Facility**

In this box, you, the enumerator, must copy the information that will be provided by your supervisor. The geographic coordinates will also be provided by your supervisor once he/she locates the coordinates in the GPS. When copying the coordinates particular care must be taken with their format.

**B.- Type and Contacts**

The type of facility and name of the principal must be entered in this box. It is important to write down contact telephone numbers for future visits.

**C.- Information about the Interview**

You must indicate your name and code, along with the name and code of your supervisor and of other personnel who have participated.

Do not forget to record the date, start time, end time and result of each visit. This is necessary to complete the survey in accordance with the established procedures. If the person did not give consent to continue with the interview, you must write option 3 (rejection) in “result.”

It is important to make contact with the principal of the facility prior to the start of the interview, since the survey must be answered by the principal or whomever he/she designates for each section. In the first contact with the principal, he/she must be made aware of the visit, so that the person in charge of answering the questionnaire has time available. The type of information that will be requested must also be explained to ensure that it is available. If in the course of the first visit you cannot contact the director of the facility, you must return on at least three more occasions, at different times and on different days.

In the case of a rejection, you can politely insist and explain that their answers are very important for us. If, despite this, the principal declines the interview, kindly say goodbye and inform your supervisor so that he/she can try to obtain the interview.



## SECTION 1: PRINCIPAL OF THE FACILITY

### Objectives of this section

The objective of this section is to identify the principal of the education facility and obtain general details regarding his/her training and experience.

### People to be surveyed

Preferably, the principal or vice-principal of the facility will be surveyed. If he/she is not present and will not be available for another interview, seek a replacement person. This person must be a member of the facility who has the knowledge necessary to respond to the items in question.

### Instructions for filling in this section

Respect the questionnaire instructions. Remember that for spontaneous response questions, you must not read the response alternatives to the interviewee. Instead, ask the question and wait for the interviewee to respond.

The observation questions must not be read aloud. Make the observation and then write down the answer.

Likewise, make sure you respect the chronological order of the questions and the skips whenever they appear.

In questions 1.19 and 1.20, ask first about the items on the list in question 1.19. If the answer is 1 (YES) skip to question 1.20. If the answer is 2 (NO) skip to the next item on the list.



NO

SI

## SECTION 2: CHARACTERISTICS OF THE FACILITY

### Objectives of this section

The goal of this section is to record the characteristics of the education facility, the type of facility, the level of government administration it falls under, education levels, timetables, etc.

### People to be surveyed

The principal must answer this section.

### Instructions for filling in this section

As indicated in the previous section, you must respect the questionnaire instructions. Remember that for spontaneous response questions, you must not read the response alternatives to the interviewee. Instead, ask the question and wait for the interviewee to respond.

Likewise, you must respect the chronological order of the questions and the skips whenever they appear.

In question 3.11, interviewees are asked to complete timetables. Answers should be entered in hours and minutes, as indicated in the sample figure:



Question 3.13 asks interviewees to indicate the three most important criteria that they use to admit new students. Note that the answers are spontaneous; wait until the interviewee mentions each of the criteria and then write them down in the boxes marked FIRST, SECOND, and THIRD in the order in which they were mentioned, as shown in the following figure:



This same question and answer structure is repeated for questions 3.18, 3.19 and 3.23.

## SECTION 3: YEARS

### Objectives of this section

The questions in this section are designed to collect basic information from the facility’s records, with respect to the number of students per year, sex, class and the number of students who repeat a year.

### People to be surveyed

To complete this section, you must request the facility’s records from the principal and transcribe the information in the table. Remember, do not ask questions unless clarification is necessary.

### 

### Instructions for filling in this section

The table in this section is divided by year, and the rows must be completed horizontally from left to right, as is indicated in the figure.



## 

## SECTION 4: LIST OF TEACHERS

### Objectives of this section

This section is designed to record the characteristics of the facility’s teaching staff.

### People to be surveyed

The facility’s teachers must answer this section.

### Instructions for filling in this section

First, complete question (4.01) by requesting the facility’s records and writing down the list of all of the facility’s teachers.



Then ask questions (4.02) to (4.08) to each teacher, as shown in the following image.



In a second stage, select teachers for the individual interviews. In the questionnaire you will find a label with a list of random numbers. To select teachers to be interviewed, you must search from left to right for the first number that coincides with a teacher on the list and assign this teacher the number 1. Proceed in the same manner to select the other two teachers.

Remember that only the teachers present are eligible for the teacher survey.

## SECTION 5: LIST OF STUDENTS OF GRADE/YEAR {xx}, CLASS "A"

### Objectives of this section

This section is designed to obtain data on all of the students of grade/year {xx} in the facility.

### People to be surveyed

You must complete this section based on the list of students provided by the principal or whomever he/she designates for this purpose.

### Instructions for filling in this section

First enter the list of students (5.01) by requesting the facility’s records and writing down the names of students from grade/year {xx}, class A of the facility.

## 

Then complete questions (5.02) to (5.04) for each student, as shown in the following image.



In a second stage, select the students to be surveyed in the same way as the teachers. Search for the first number in the list of random numbers on the label until it coincides with one of the students on the list, and then select the rest of the students, using the numbers on the label, reading from left to right.

Remember that only the students present are eligible for the student questionnaire.

## SECTION 6: SELECTED TEACHER

### Objectives of this section

This section is designed to collect information about the randomly selected teachers.

### People to be surveyed

The randomly selected teachers will be surveyed.

### Instructions for filling in this section

At the top of the section enter the teacher’s identification details, name and identification code.

Ask the questions, respecting their chronological order and reading from the upper left-hand margin vertically from top to bottom. Then continue on to the questions on the right hand-side, always reading vertically from top to bottom, as indicated in the figure.



As indicated in previous sections, you must respect the questionnaire instructions. Remember that for spontaneous response questions you must not read the response alternatives to the interviewee. Rather, ask the question and wait for the interviewee to respond.

Likewise, you must respect the skips whenever they appear.

In the questions where various items are listed and each must be covered in order to obtain the corresponding answer, record the code 1 (YES) or 2 (NO) in the box, as is shown in the following figure.



Complete:

1 YES

2 NO

As indicated in the previous section, in questions 6.16 and 6.17, ask first about the items on the list in question 6.16. If the answer is 1 (YES), skip to question 6.17. If the answer is 2 (NO), skip to the next item on the list.

## SECTION 7: SELECTED STUDENT

### Objectives of this section

This section is designed to collect information about the randomly selected students.

### People to be surveyed

The randomly selected students will be surveyed.

### Instructions for filling in this section

At the top of the section enter the student’s identification details, name and identification code.

Ask the questions, which are divided into three columns, respecting their chronological order. Read starting from the upper left-hand margin vertically from top to bottom. Then continue on to the questions on the right-hand side, always reading vertically from top to bottom, as indicated in the figure.



You must respect the questionnaire instructions. Remember that for spontaneous response questions, you must not read the response alternatives to the interviewee. Rather, ask the question and wait for the interviewee to respond.

Likewise, you must respect the skips whenever they appear.

In the questions where various items are listed and each of them must be covered in order to obtain the corresponding answer, record the code 1 (YES) or 2 (NO) in the box, as is exemplified in the previous section.