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Automating Quota Sampling Protocols

Case Study: "Proyecto Mi Barrio" Phone Survey, Medellín, Colombia

The "Proyecto Mi Barrio" research project based in Medellín, Colombia conducted phone surveys over a one-month period during the COVID-19 pandemic. The survey aimed to analyze how organized crime groups were responding to the pandemic. To ensure that the sample was representative of the full set of neighborhoods, or *barrio*, the project used quota sampling, where a set number of respondents from each neighborhood was targeted to be surveyed. The research team fully automated this process in SurveyCTO to reduce sources of error.

Protocol detail

The research team in Medellín faced challenging conditions to conduct phone surveys due to the pandemic and the sensitive nature of questions related to organized crime groups and illegal activities such as extortion and drug markets. To ensure that only the minimum number of respondents were surveyed, the team developed an automated quota sampling procedure that updated eligibility of potential respondents in real time.

The pandemic changed the way researchers are conducting surveys to minimize contact. This includes using delivery services to distribute survey devices, conducting remote training and, establishing remote protocols. As part of this, the research team used a dynamic tracking system based on preloaded geolocation information to determine eligible cases for interviewers. This required the following steps:

- Gather respondent location and contact information from as many sources as are relevant.
- Define the minimum and maximum number of respondents per spatial unit. In this case, four per *barrio*.
- Use SurveyCTO case management and [CATI](#) tools to make calls, enter surveys, and receive data within the survey form.
- Automatically update tracking [datasets](#) based on incoming survey data and calculate quota sampling limits.

The automated protocol prevents surveys from being completed once quota has been reached. When an enumerator starts a new survey and enters the respondent's location variable, the SurveyCTO form pulls in the newest tracking data about completed surveys to determine the number of completed surveys for that respondent's *barrio*. It prevents the survey from continuing if the calculation has reached the quota. IPA partnered with SurveyCTO, IPA's preferred survey platform, to share this protocol with thousands of users around the world. You can read more on the [SurveyCTO Blog](#), and see a visualization of the SurveyCTO data flow below:



This document was made possible by the work of David Cerero and Juan Pablo Mesa-Mejía. IPA's phone survey methods case studies are part of a series on best practices on implementing surveys using computer-assisted telephone interviewing (CATI) and other remote survey modes. These case studies are made possible with the generous support from and collaboration with Northwestern University's Global Poverty Research Lab (GPRL).

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