

Building Rapport and Trust in Phone Surveys

Case Study: Phone Surveys in Ghana

Innovations for Poverty Action (IPA) shifted its data collection efforts during the COVID-19 pandemic to phone surveys. The IPA Ghana office developed and operationalized new study protocols in large research projects based on experiences implementing virtual phone banks and testing protocols during piloting. While it is important to re-write questionnaires, re-train enumerators, and overhaul data quality procedures for phone surveys, establishing effective protocols for building rapport and trust are vital to ensure that phone surveys produce high-quality data.

Recommended protocols

For virtual phone surveys, where face-to-face contact before the survey begins is impossible, consider implementing specific protocols to build rapport and trust with respondents:

- Provide a detailed **overview of IPA, the study, and enumerator responsibilities** to build trust in IPA.
- Provide **IPA phone numbers and web addresses** to help respondents verify that IPA is a legitimate organization.
- Provide **contact information for staff** so that respondents can confirm the legitimacy of enumerators and the study.
- Assure respondents that they **will never be asked for money** at any point in the survey process.
- **Reduce duration of surveys** and in-person data quality procedures; keep surveys to 30 minutes or less and explain how long the survey will take at the beginning of the call.
- Provide **respondent gifts** within a short timeframe, ideally providing phone credit within 1-2 days of survey.
- Ensure enumerators work in a **quiet environment** where background noise will not distract respondents.
- **Train enumerators on how to handle difficult phone conversations**, including offering to reschedule, clearly explaining confidentiality, assuring that nothing is being sold by IPA, and when to escalate calls to supervisors.
- **Maintain open and dynamic relationships with enumerators**, such as by allowing flexible work hours and by hosting debrief meetings to discuss challenges and solutions.

Special considerations for interviewing children

Several additional protocols and considerations emerged for interviewing children (with caregivers):

- **Provide phone credit and pre-schedule calls** for when both the child and caregiver will be present. Completing surveys with both children and caregivers present can be difficult, as children may move households and are not always with caregivers. Interviews were more likely to be conducted when enumerators provided credit, and pre-scheduled or even simply predicted times when both would be present.
- **Emphasize the academic use of the survey** in the informed consent and with regular reminders in the survey. Adults seemed more likely to allow the child to respond to questions without any influence when they understood that the questions would not be used for anything but academic purposes.
- **Make callbacks and/or enumerator re-assignments** to ensure completion of surveys with sensitive questions. Caregivers sometimes found certain questions to be sensitive or even insulting, such as questions to children about food security. If caregivers found questions inappropriate, they sometimes opted to end the survey early. Waiting a few days to follow up on incomplete surveys led to higher survey completion rates. (And of course, there is no substitute for good questionnaire design!)

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).