

Fieldwork Management System (FMS)

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Background

- As the use of CAPI and PAPI varies across countries, so do the methods to record contact attempts
- Availability and quality of fieldwork progress reports vary considerably
- For cross national surveys it is difficult to have timely and accurate picture of fieldwork in all countries
- Also limits understandings of non-response and interviewer effort during fieldwork as analysis often takes place after fieldwork

SHARE

- Standardised software to manage sample and log contact attempts
- Updates available during fieldwork, and are comparable
- BUT use of laptops means its inconvenient to record in real time

ESS

- Detailed contact forms
- Often not available in real time
- Detailed analysis only completed once fieldwork has finished
- Mix of CAPI and PAPI means quality of data collected varies

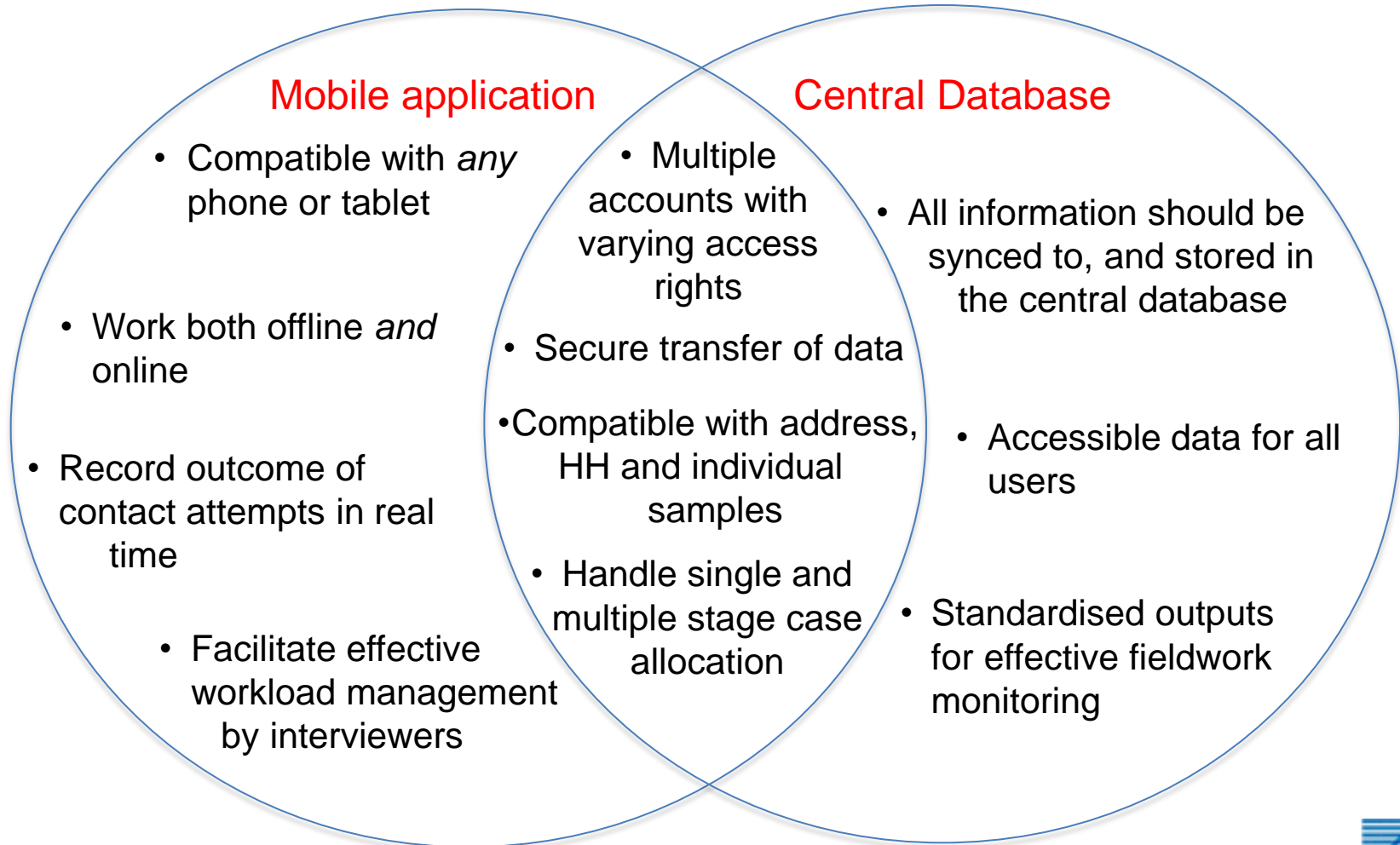
FMS

- Centralised sample management
- Portable and easy method to log contact attempts
- Providing timely and detailed progress updates to enable real time monitoring
- Controlled access to ensure data confidentiality

Design & development - 1

- Survey of 22 ESS6 and 4 SHARE fieldwork directors
 - Aims: to get a better understanding of current fieldwork practices and to have their input of the development of the tool
 - Asked about the methods used to issue cases and monitor progress, essential features for the FMS, and perceived barriers to implementation
- Results informed the development of the specification for the FMS, including the substantive and technical features

Design and Development (2)



Programming and Testing

- Structured approach to testing, using test case scenarios which mirrored the way interviewers might use the application
- ‘Essential’ and ‘optional’ features from the specification were grouped according to functionality
- Test cases were designed assess Usability; Security; Data transfer, Fieldwork processes and Outputs.
- Testing carried out by researchers and programmers
- Issues logged in Redmine

Programming and Testing (2)

- Specification was very ambitious – so prioritised *essential* and *achievable* features
 - Extending and improving user interface (UI)
 - Ability to add, edit and save information
- Development and testing then became more focused on debugging and refining the FMS
- Subsequent testing carried out remotely

Outcome

- A prototype mobile application and the basic structure for the central database
- Functionalities available:
 - Secure login
 - Clear overview of cases
 - Search function
 - Respondent / HH selection
 - Recording contact attempts
 - Notes function
 - Neighbourhood Characteristic Questionnaire
 - Saving a new address
- Also produced a final report detailing progress from the specification to the prototype developed.

Future development

Additional features include:

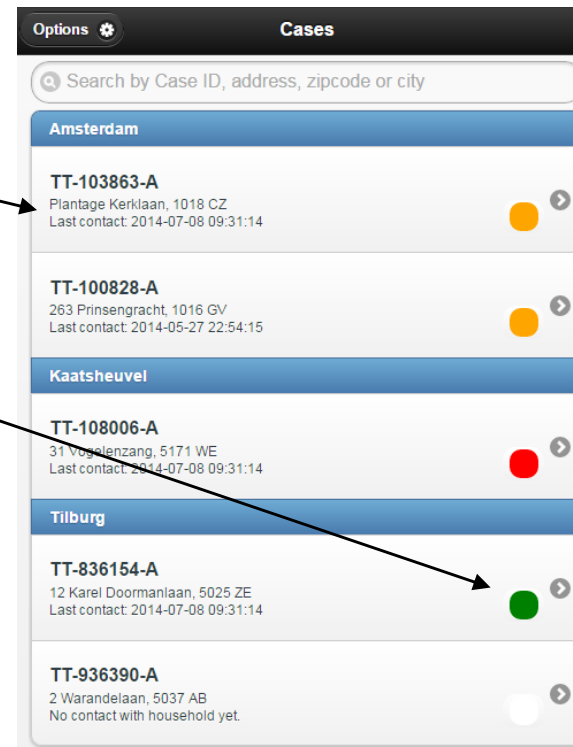
- Convert / translate the app into other languages
 - Provide interviewer statistics
 - Implement checks to prevent user error
 - Ensure compatibility with national sample data
- User testing
 - Pilot study
 - Scoping study

Example 1: Logging a successful contact attempt

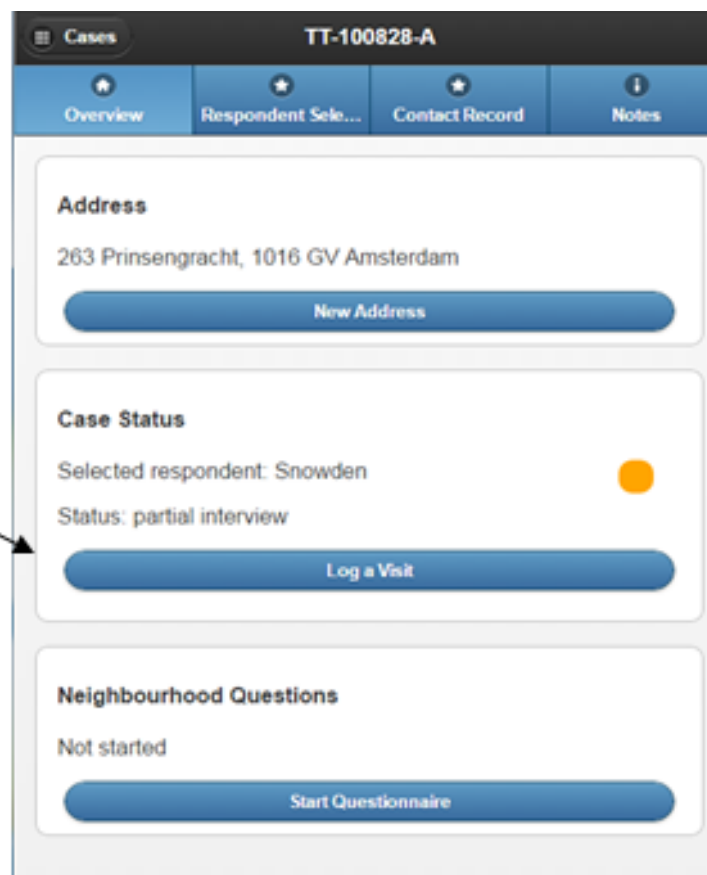
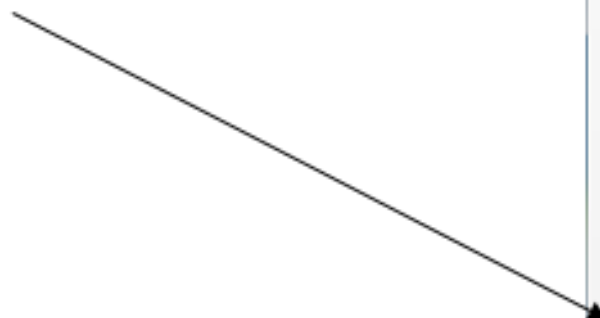
One of the first screens gives an overview of all of the cases currently allocated to the interviewer.

The overview also allows the interviewer to see the date of the last contact attempt

The colour coded system gives a simple overview of the status of the case

A screenshot of a mobile application interface titled "Cases". At the top, there is a search bar with the placeholder text "Search by Case ID, address, zipcode or city". Below the search bar, the cases are grouped by location. The "Amsterdam" group contains two cases: "TT-103863-A" (Plantage Kerklaan, 1018 CZ, last contact: 2014-07-08 09:31:14) and "TT-100828-A" (263 Prinsengracht, 1016 GV, last contact: 2014-05-27 22:54:15). The "Kaatsheuvel" group contains one case: "TT-108006-A" (31 Vogelzang, 5171 WE, last contact: 2014-07-08 09:31:14). The "Tilburg" group contains two cases: "TT-836154-A" (12 Karel Doormanlaan, 5025 ZE, last contact: 2014-07-08 09:31:14) and "TT-936390-A" (2 Warandelaan, 5037 AB, No contact with household yet). Each case entry includes a color-coded status indicator (yellow, red, or green) and a right-pointing arrow.

The interviewer can then log a visit by selecting this



Cases TT-100828-A

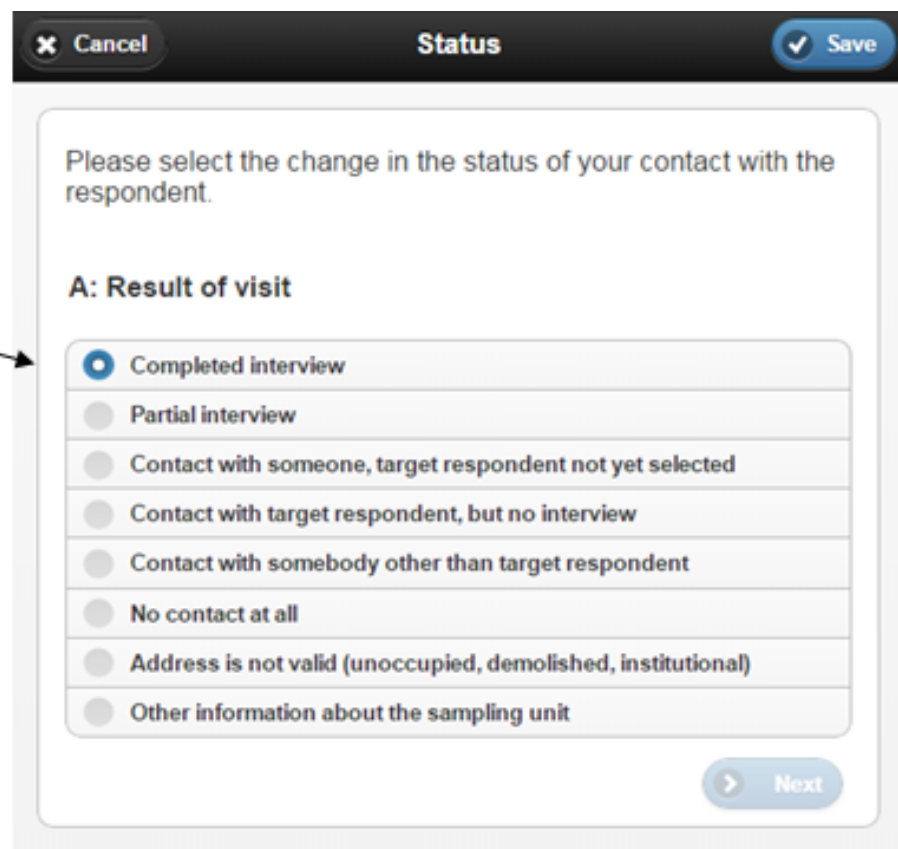
Overview Respondent Sele... Contact Record Notes

Address
263 Prinsengracht, 1016 GV Amsterdam
New Address

Case Status
Selected respondent: Snowden
Status: partial interview
Log a Visit

Neighbourhood Questions
Not started
Start Questionnaire

The interviewer will then be able to log the outcome of the visit (in this example, a completed interview).



Cancel **Status** **Save**

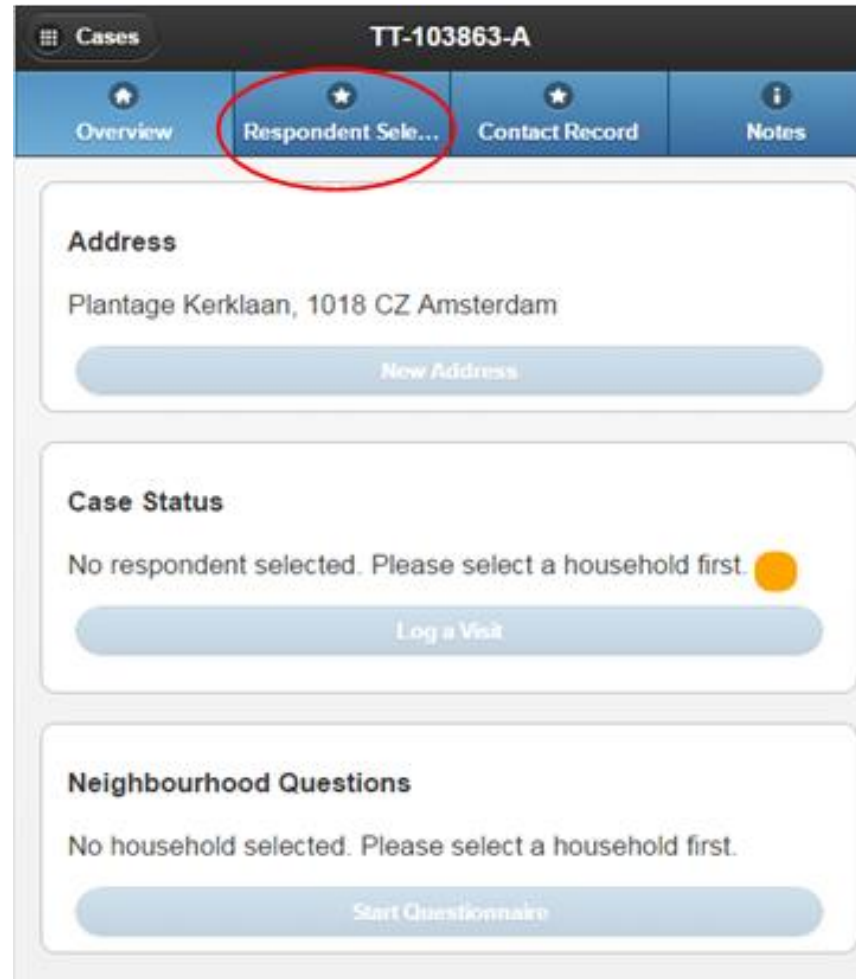
Please select the change in the status of your contact with the respondent.

A: Result of visit

- Completed interview
- Partial interview
- Contact with someone, target respondent not yet selected
- Contact with target respondent, but no interview
- Contact with somebody other than target respondent
- No contact at all
- Address is not valid (unoccupied, demolished, institutional)
- Other information about the sampling unit

Next

Example 2: Selecting a household

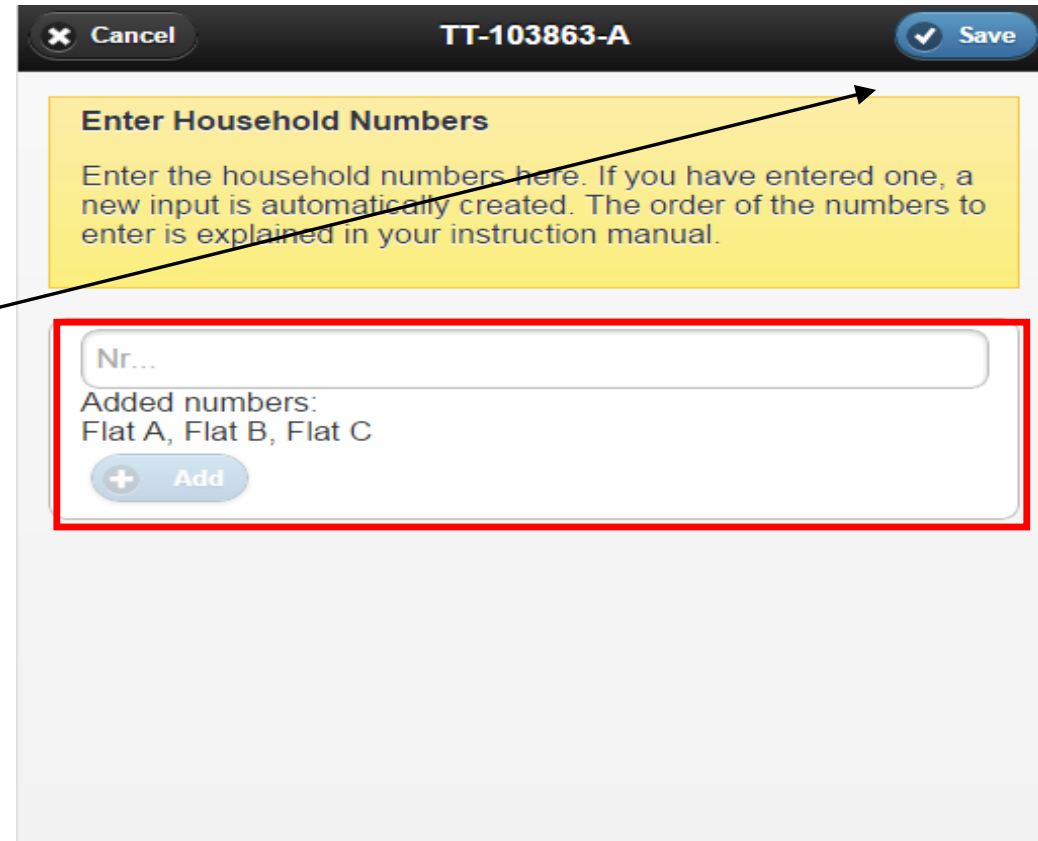
A screenshot of a mobile application interface. At the top, a dark grey header bar contains a hamburger menu icon, the word "Cases", and the case ID "TT-103863-A". Below this is a blue navigation bar with four tabs: "Overview", "Respondent Sele...", "Contact Record", and "Notes". The "Respondent Sele..." tab is circled in red. The main content area is divided into three sections: "Address" with the text "Plantage Kerklaan, 1018 CZ Amsterdam" and a "New Address" button; "Case Status" with the text "No respondent selected. Please select a household first." and a "Log a Visit" button; and "Neighbourhood Questions" with the text "No household selected. Please select a household first." and a "Start Questionnaire" button.

<http://cdata21.uvt.nl/slimfms/>

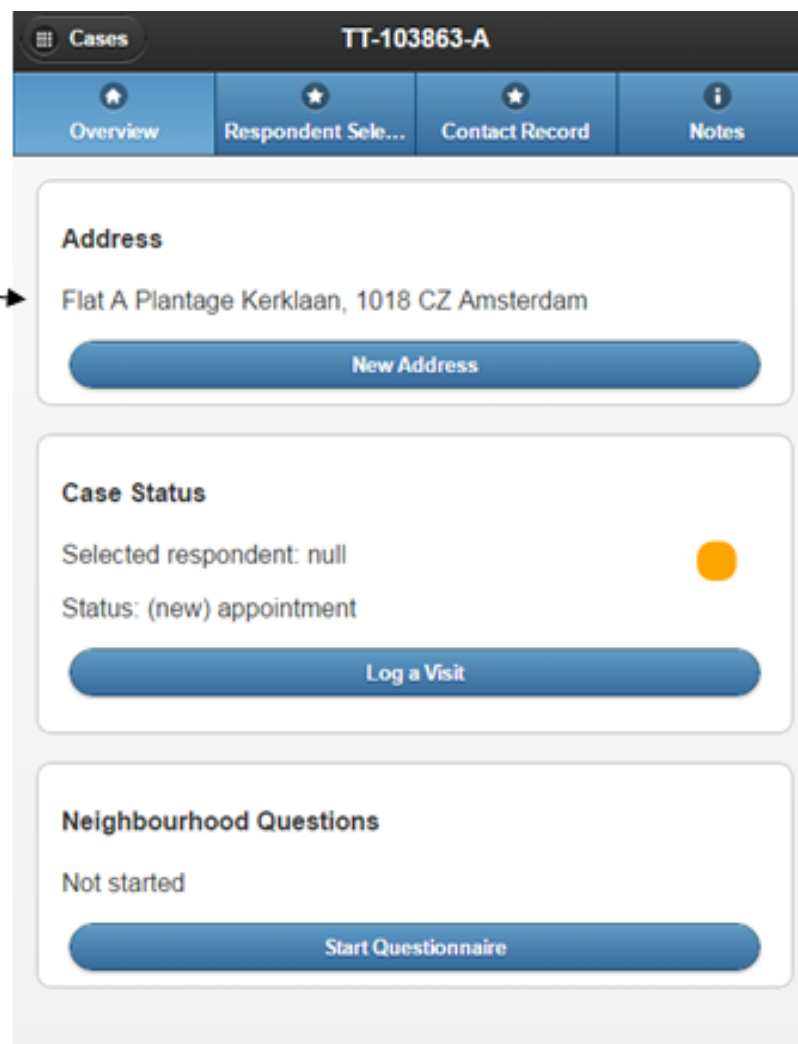
On this screen, the interviewer must enter the household numbers present at the address.

In this example, there are three flats (Flat A, Flat B, and Flat C).

Once entered, pressing the 'Save' button will prompt the selection of one of the households, using the KISH selection method.

A screenshot of a mobile application interface. At the top, there is a black header bar with a 'Cancel' button on the left, the text 'TT-103863-A' in the center, and a 'Save' button on the right. Below the header is a yellow box with the title 'Enter Household Numbers' and the text: 'Enter the household numbers here. If you have entered one, a new input is automatically created. The order of the numbers to enter is explained in your instruction manual.' Below this is a white input field with the placeholder text 'Nr...'. Underneath the input field, it says 'Added numbers: Flat A, Flat B, Flat C'. At the bottom of this section is a blue button with a plus sign and the text 'Add'. A red rectangular box highlights the input field and the 'Added numbers' section. A black arrow points from the top right of the yellow box towards the 'Save' button.

In this example, 'Flat A' was selected,
and the address has been updated
from 'Plantage Kerklaan, 1018 CZ
Amsterdam'
to
'Flat A Plantage Kerklaan, 1018 CZ
Amsterdam'



Cases TT-103863-A

Overview Respondent Sele... Contact Record Notes

Address
Flat A Plantage Kerklaan, 1018 CZ Amsterdam
New Address

Case Status
Selected respondent: null
Status: (new) appointment
Log a Visit

Neighbourhood Questions
Not started
Start Questionnaire

With thanks to.....

This project has included multiple collaborators including:

- Sally Widdop (formally of ESS ERIC HQ, UK),
- Lennard Kuijten & Iggy van der Wielen (CentERdata, Netherlands),
- Johanna Bristle (MEA, Germany)
- Verena Halbherr (GESIS, Germany).