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GLOBAL POVERTY
RESEARCH LAB

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Remote Surveying in a Pandemic: Handbook

Executive Summary

Innovations for Poverty Action(IPA) is a research and policy nonprofit that discovers and promotes effective solutions to global poverty problems; since our founding in 2002, IPA has worked with over 600 leading academics to conduct over 830 evaluations in 51 countries. As part of IPA's response to COVID-19, many existing and new data collections have shifted to remote data collection modes including computer-assisted telephone interviews (CATI), interactive voice response (IVR) and SMS surveys.

This transition has required new protocols, new tools, and new workflows to ensure that data can be collected at similarly high-quality across remote survey modes. This is compounded by the logistics and health challenges associated with a global pandemic. This document contains tips and best practices for shifting face-to-face surveys to remote survey modes, as a response to pandemic conditions where person-to-person contact risks virus transmission.

IPA's Global Research and Data Support (GRDS) team has created technical tools and protocols that fall into four categories of tasks for remote surveying. We summarize the major changes and available tools for CATI, the predominant choice for remote data collection mode, in this document according to these tasks:

- **Data collection**
  - **Deciding when to delay data collection** is the first step to implementing a study. The transition to remote survey modes may require rethinking what a data collection can measure.
  - **Deciding an appropriate remote survey mode** is a direct result of the different characteristics of various modes.

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COVID-19 has resulted in many challenges for high-quality data collection. To this end, the Global Research and Data Support (GRDS) team at IPA has compiled best practices gleaned from over 50 remote survey data collections that IPA has conducted into a remote surveying handbook. This handbook describes ways to adjust common protocols and tasks needed to successfully implement a survey data collection. It focuses specifically on collecting data using computer-assisted telephone interviews (CATI), but also covers general details around interactive voice response (IVR), SMS, and web surveys. It pays special attention to the context of COVID-19 and strategies to maintain data quality during a pandemic.

This handbook assumes some technical knowledge and familiarity with survey data collection. It is intended for researchers, but details the often-neglected skills of managing remote data collection, including the logistics of implementation and use of technical tools that are central to collecting high quality data.

Please send any feedback, questions, or comments to our Global Research & Data Support Team.

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