

Polling Training Guide *Version: June 2020*

The Updated ODK for Pan India Polling is linked [here](#).

NOTE: This document is meant to be a guide for each project location. Project teams are requested to adapt this document, the training protocols and the questions for their own locations. Please make sure to share the final versions of your polling surveys with Niriksha and Tarun, and include at the end of the document. There are 14 key questions (5 on farmers' information needs, 4 on farmers' knowledge and adoption of recent advisory, 5 on general service feedback) that we hope to standardize across locations. Projects are welcome to add additional questions and response options that might be relevant to their programs. Feedback on how to improve this is welcome!

I. Context

PAD in India is working across 6 different states to provide mobile phone-based agricultural advice to over 800,000 farmers. In each of these contexts, PAD provides customized advice through a combination of the following services: i) weekly advisory messages tailored to crop, location and demographics, and ii) access to an IVR hotline that allows farmers to call in and ask questions, listen to advice including previous advisory calls, frequently asked questions and price information. Polling refers to feedback surveys PAD conducts with a random subsample of users on a weekly basis and is a critical component of PAD's iterative data-driven approach. Data collected through these surveys is meant to provide both monitoring against projects' Theory of Change and feedback into the content design process, ultimately improving the quality and relevance of advice we provide to our farmers.

II. Objectives

The polling survey has three objectives:

- i) Needs assessment: To generate insights on farmers' information needs (Section C)
- ii) Specific feedback: To monitor whether farmers access, understand and adopt weekly advisory (Sections D-E)

iii) General feedback: To collect farmers feedback on the service, including challenges faced (Sections F- G)

III. General principles:

- I. ***Samples:*** Ideally, each project should include a sample of all “active” (those that have picked up in the last 6 months) farmers on a weekly basis depending on surveyor capacity, with a representative sample from each district.
- II. ***Targets:*** Teams should decide targets based on the number of surveys they’d like to conduct. The Karnataka team for example does about 50-100 farmers / week, while the Odisha team used to target close to 300. This will depend on the number of surveyors as well. On average, a surveyor in a single day is expected to reach between 25-30 farmers.
- III. ***Communication with supervisor:*** Surveyors are expected to communicate any challenges faced during the day with their supervisor. This includes issues with telecommunications, questions raised by farmers, issues with data quality and targets.
- IV. ***Survey questions should be read as they are listed:*** Training of surveyors and monitoring should be done such that questions are not modified and the wording doesn’t change to ensure that we are asking exactly the same question to each farmer and getting equivalent responses. Surveyors should be encouraged to share any challenges asking questions or struggle to get the correct answer with their supervisor.
- V. ***Instructions for each question should be followed carefully.*** The survey questions have hints that clarify the objective of the question and the key instructions. Please make sure to read the hints.
 1. Consent - The consent statement should be exactly as it is, please do not skip any words.
 2. Options - The default is to not read out loud the options, unless specified in the question.

III. Quality controls:

- A. The quality of the surveys is regularly monitored to identify outliers and incorrect answers. All associates on project teams are encouraged to create separate high frequency do-files to flag data that is beyond a specified range of variability and can be verified by calling back these farmers.
- B. In addition to flagging data errors, supervisors (or well-trained surveyors, depending on capacity) on every project are encouraged to conduct back-checks of a random subsample of calls. This can be done in two ways - i) if surveyors are recording calls, supervisors should be assigned a % of calls for a second listen - ideally 10%, but can vary depending on sample. ii) if there are no recordings, supervisors are encouraged to call a random subsample of farmers every week (roughly 5%) to validate a few questions. Ideally, the

backcheck process should have representative data across enumerators to ensure that quality is maintained across the time. For all back-check calls, supervisors should follow the same rule-of-thumb as the surveyors of maximum 3 call attempts.

Section II: Template Questionnaire with Guiding Recommendations

Section 0. Survey information

	Questions	Answer choices	Hints
01	Surveyor name		
02	Respondent ID		
03	Respondent name [pre-filled]		
04	Respondent phone number [pre-filled]		
05	Call attempt	[Integer]	The attempt must be between 1 and 3.
06	What is the phone call status?	<ol style="list-style-type: none"> 1. Call answered → Section A. Informed Consent 2. Phone off 3. Not answering 4. Busy 5. Wrong number 6. Out of service 	If the phone number says wrong number or out of service, associates on the project should filter these out and confirm that these users fall in the “inactive” list. If they are not, these users should go back into the backcheck criteria for supervisors.

Section A. Consent

	Questions	Answer choices	Hints
A1	<u>Read:</u> Namaskar, my name is \${surveyor} and I am calling from the \${project_name} service. Am I speaking to \${respondent_name}?	<ol style="list-style-type: none"> 1. Yes 2. No 	<p>Note: If the person you are speaking to is not \${respondent_name}, please request to talk to \${respondent_name}</p> <p>If the person is not available, ask for a later time to call back and update the status accordingly.</p>

A2	<p><u>Read:</u> Thank you for subscribing to \${name of service based on project! As you must already be aware, you receive weekly advisory messages from our service, and can also call into a helpline to ask questions and listen to advice. We would like to ask you a few questions to understand your current information needs and feedback on the service. The survey is expected to take about 10 minutes. You can choose to stop participating at any time. Your answers will be recorded and used to improve the quality of the service being provided to you. Do you give your consent to carry on the survey?</p>	<ol style="list-style-type: none"> 1. Yes 2. No 	<p>Consent text should be read word by word. Please do not skip any sections. <i>Projects can adapt specific sections of the consent form (eg: service features or ability to record calls, but let's try to keep the main script standard).</i></p>
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Section B. Demographics

	Questions	Answer choices	Hints
B1	District	[pre-filled]	
B2	Gender	[pre-filled]	
B3	Primary \${current agricultural season} crop	[pre-filled]	

Section C. Current information needs

	Questions	Answer choices	Hints
Note	<u>Read:</u> In order to improve the content that we share with you, we would like to first understand your current information needs		
C1	What is the primary crop you are growing this season?	<ol style="list-style-type: none"> 1. \${list of crops that project sends weekly advisory messages on} 2. Other (sub-crop list) 3. None 	<p>In case a farmer says 'None', thank the farmer for their time, and end the call.</p> <p>If the farmer says 'Other', skip to section D.</p>

C1.1	Your primary crop for this season is different from the crop you reported during the profiling survey. Have you changed your primary crop?	<ol style="list-style-type: none"> 1. Yes 2. No 	
C2	What is the current stage of \${crop}	<ol style="list-style-type: none"> 1. Crop Planning / Seed Selection 2. Nursery 3. Sowing/Transplanting (< 1 week) 4. Sowing/Transplanting (1-2 week) 5. Sowing/Transplanting (2-3 week) 6. Sowing/Transplanting (1 month) 7. Sowing/Transplanting(1-1.5 months) 8. Sowing/Transplanting(1.5-2 months) 9. Sowing/Transplanting (2-3 months) 10. Sowing/Transplanting (>3 months) 11. Other (text box) 	Surveyor does not need to read out all options. It is okay to prompt the farmer in this question
C3	Which is the most important topic of information you would like to receive in the next 2 weeks? [select one]	<ol style="list-style-type: none"> 1. [List of topics]. 2. Other (text) 99. None 	
Note:	We would be asking some questions on pests or weed or insects that you observe in the crop or any crop disease that you see around.		
C4	Have you seen any pest/weed/insect/disease in \${crop} in your field in the last two weeks?	<ol style="list-style-type: none"> 1. Yes 2. No 	
C4.1	If yes, which pest/weed/insect/disease have you seen?	<ol style="list-style-type: none"> 1. [List of pests]. 2. Other (text box) 	

C5	Have you seen or heard about any pest/weed/insect/disease in $\{\text{crop}\}$ from other farmers who have plots in the same village as you?	<ol style="list-style-type: none"> Yes No 	
C5.1	If yes, which pest/weed/insect/disease have you seen?	<ol style="list-style-type: none"> [List of pests]. Other (text box) 	
C6	What other crops are you growing (or plan to grow) this Kharif season? [Select up to two]	<ol style="list-style-type: none"> $\{\text{list of crops that project sends weekly advisory messages on}\}$ Other (sub-crop list) 999. None 	

Section D. Access & understanding

	Questions	Answer choices	Hints
D1	Did you receive and pick up one or more advisory messages from the $\{\text{project_name}\}$ service in the last two weeks?	<ol style="list-style-type: none"> Yes → D2 No → D1.1 98. Don't know/ prefer not to answer → D1.1	
D1.1	Did you receive and pick-up one or more advisory messages from the $\{\text{project_name}\}$ in the last 3 months?	<ol style="list-style-type: none"> Yes -> Section D2 No -> Section F 	
D2	If yes, did you listen to one or more messages till the end?	<ol style="list-style-type: none"> Yes → D3 No → D2.1 97. Don't remember/ prefer not to answer → D3	
D2.1	If no, what was the reason? <i>SURVEYOR NOTE: Do not read options.</i>	<ol style="list-style-type: none"> I did not understand the message content The message content was not useful/ relevant to me The message was too long No time (busy or had to leave to do something) 	

		<ul style="list-style-type: none"> 5. I've received too many messages from $\{\text{project_name}\}$ / I had heard this message before 6. Call dropped/network issue 7. Other [text] 97. Don't remember/ prefer not to answer 	
D3	Do you remember the topic of any message you received in the last two weeks? [Do you remember what the message was about?]	<ul style="list-style-type: none"> 1. Yes → D3.1 2. No → Section E 98. Don't know/ prefer not to answer → Section E 	
D3.1	<p>If yes, what was the topic(s)?</p> <p><i>SURVEYOR NOTE: Select up to 2.</i></p>	<ul style="list-style-type: none"> 1. [List of topics] 2. Other (text) 98. Don't know/ prefer not to answer 	

Section E: Adoption

	Questions	Answer choices	Hints
E1	Did you follow any of the recommendations that you received from $\{\text{project_name}\}$ in the past two weeks?	<ul style="list-style-type: none"> 1. Yes → E1.1 2. No → E1.2 98. Don't know/ prefer not to answer 	
E1.1	<p>If yes, what did you do?</p> <p><i>SURVEYOR NOTE: Do not read options. Encourage farmers to provide detail and select the most relevant option.</i></p>	<ul style="list-style-type: none"> 1. I bought a new seed(s) or input(s) 2. I used a different amount of a seed(s) or input(s) 3. I changed the timing of an agricultural activity 4. I changed my approach to an 	

		<p>agricultural activity</p> <p>5. Other [text]</p> <p>98. Don't know/ prefer not to answer</p>	
E1.2	<p>If no, why not?</p> <p><i>SURVEYOR NOTE: Do not read options. Encourage farmers to provide detail and select the most relevant option. Select up to 3.</i></p>	<p>1. Recommended seed or input was not available near me</p> <p>2. Recommended seed or input was too expensive.</p> <p>3. I didn't understand some or all of the advisory message.</p> <p>4. I knew the information already.</p> <p>5. The information was not relevant to me- I grow a different crop to the one in the advisory</p> <p>6. The information was not relevant to me - other</p> <p>7. I disagreed with the advisory.</p> <p>8. The message was too detailed and/or too long.</p> <p>9. The message was not sufficiently detailed and/or too short.</p> <p>10. Other [text]</p> <p>98. Don't know/ prefer not to answer</p>	
E2	<p>Did you discuss any of the messages that you received from \${project_name} in the past two weeks with someone else?</p>	<p>1. Yes</p> <p>2. No</p>	
E2.1	<p>What was the topic(s) of the message you discussed?</p>	<p>1. [List of topics]</p> <p>2. Other (text)</p> <p>98. Don't know/ prefer not to answer</p>	

	<i>SURVEYOR NOTE: Select up to 2.</i> <i>CODING NOTE: Ask if E2==1</i>		
E2.2	Who did you discuss the message(s) with? <i>SURVEYOR NOTE: Clarify exactly who the farmer spoke with. Select up to 3.</i> <i>CODING NOTE: Ask if E2==1</i>	<ol style="list-style-type: none"> 1. My spouse 2. Another family member or relative 3. A farmer in my village 4. A farmer in another village 5. An agro-dealer 6. Other (text) 98. Don't know/ prefer not to answer 	

Section F. Challenges (only if D1.1= “No”)

	Questions	Answer choices	Hints
F1	Do you remember receiving a message from <code>#{project_name}</code> in the last 3 months?	<ol style="list-style-type: none"> 1. Yes 2. No → Z 	
F2	What were the main reasons for not picking up? <i>SURVEYOR NOTE: Do not read options. Encourage farmers to be honest and provide detail. Select up to three options</i>	<ol style="list-style-type: none"> 1. The advisory is not useful or relevant to me. 2. I missed the calls. 3. I was too busy. 4. I receive too many messages from <code>#{project_name}</code> 5. I have not been farming this season 6. I do not know what the <code>#{project_name}</code> is/ I don't remember registering for the <code>#{project_name}</code> 98. Don't know/ prefer not to answer 	

F3	What are the reasons why the advisory was not useful or relevant? If F2==1	<ol style="list-style-type: none"> 1. The recommended seeds and inputs were not available near me 2. The recommended seeds and inputs were too expensive 3. I didn't understand some or all of the advisory. 4. I knew the information already. 5. The information was not relevant to me - I grow a different crop to the one in the advisory 6. The information was not relevant to me - other 7. I disagreed with the advisory. 8. The messages were too detailed and/or too long. 9. The messages were not sufficiently detailed and/or too short. 10. Other [text] 11. I don't understand the advisory <p>98. Don't know/ prefer not to answer</p>	
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Section G. General feedback

	Questions	Answer choices	Hints
G1	Would you recommend the \${project_name} service to your friends/family?	<ol style="list-style-type: none"> 1. Yes 2. No <p>98. Don't know/ prefer not to answer</p>	Net promoter score for all programs

G2	How would you rate the usefulness of the advisory message that you received in the last two weeks?	<ol style="list-style-type: none"> 1. Not at all useful 2. Somewhat not useful 3. Neither useful nor unuseful 4. Somewhat useful 5. Very useful <p>98. Don't know/ prefer not to answer</p>	
G3	Would you like to continue receiving advisory from \${project_name}?	<ol style="list-style-type: none"> 1. Yes 2. No 	

Section Z: End prompt

Note	<u>Read:</u> We have completed the survey, thank you for your time. Please continue to use our service and remember that you can call into our helpline at 033 6136 7136 to ask questions and listen to advice, free of cost, whenever you like.		
Z1	Was the survey completed?	<ol style="list-style-type: none"> 1. Yes -->End Survey 2. No 	
Z2	Should the respondent be called back?	<ol style="list-style-type: none"> 1. Yes 2. No 	
Z3	Reason for incomplete survey	<ol style="list-style-type: none"> 1. Confidentiality concerns 2. No time 3. Respondent did not understand survey 4. Respondent too young or did not share age 5. Refused to confirm identity 6. Wrong respondent/ wrong number 7. Bad signal/could not hear respondent 8. Phone off 9. Not answering 	If the phone number says wrong number or out of service, associates on the project should filter these out and confirm that these users fall in the "inactive" list. If they are not, these users should go back into the backcheck criteria for supervisors.

		10. Out of service 97. Other (specify)→ Z3.1	
Z3.1	Other, please specify.	[Text]	
Z4	Are there any other further notes that you want to add to this survey? <i>Note for surveyor: Leave this question blank if you don't have anything to add.</i>	[Text entry]	

FAQs/tips on how to conduct polling survey

- a. What do you do when you call a respondent and the phone is turned off, the respondent is not picking, or the telephone has no network?
 - i. If you do not reach a respondent on the first attempt, make 1 more attempt at least 3 hours later (for example, call at 9am, 12pm). If you do not reach a respondent on the second attempt, try again on the next day.
 - ii. If you have tried 3 times to reach a respondent over two days and still cannot reach them, move on to the next assigned respondent.
- b. What do you do when a respondent says they are too busy to participate in the survey?
 - i. Ask the respondent if you can call back later. If they say no, record this and close the survey. If they say yes, call back at least 3 hours later.
- c. What do you do when there is a poor network connection during a call/phone hangs up?
 - i. Politely ask the respondent to move to a place with better network connection.
 - ii. If the connection is still bad ask the respondent if you can call back later. If they say no, record this and close the survey. If they say yes, then call back at least 3 hours later.
- d. Respondent unwilling or doesn't trust PAD.
 - i. If the respondents decline to consent because they are worried about confidentiality, the enumerator should first assure the respondent about our confidentiality policy, explain the purpose of the study again and the huge importance of their participation. Emphasize that no one will know if they have taken the survey or their responses.
 - ii. If the respondent still refuses to participate, thank them for their time and record the reason for their refusal on the survey form.
- e. What do you do when the person that answers the call has a different name to that in the tracking sheet?
 - i. Ask if you can speak to the person that is listed in the tracking sheet. If the respondent says that the person listed in the tracking sheet is not available at this time, ask if you can call back later.
- f. What to do if you complete a survey half way and the call cuts or gets disconnected?
 - i. In this case, please keep the form on edit and do not submit. Please try to reach the respondent at least 2 more times (based on the spacing interval in point a.). However, if you still cannot connect and complete the survey, please indicate incomplete and submit.

Links to project-wise polling surveys

1. [Odisha](#)
2. [West Bengal](#)
3. [TNC](#)
4. [Gujarat](#)
5. [Karnataka](#)