Trainer's Guide

KPC Training Module 2: Training Supervisors and Interviewers

Key Contributors

The **CORE Group,** a membership association of international nongovernmental organizations (NGOs) registered in the United States, promotes and improves the health and well being of women and children in developing countries through collaborative NGO action and learning. CORE's *Monitoring and Evaluation Working Group* develops tools and trainings to increase child survival and health program performance and quality through the standardization of use of data, analysis, and reporting. This publication was made possible by support provided to CORE from the Bureau for Global Health, United States Agency for International Development (USAID) under cooperative agreement FAO-A-00-98-00030. This publication does not necessarily represent the views or opinion of USAID.

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Freedom from Hunger (FFH) focuses on the vital and interdependent connection between health and financial security for progress against chronic hunger and poverty. FFH works with direct service providers, technical assistance providers and NGOs to disseminate knowledge and tools tested and used on a global scale to build health and financial security for poor women, their families and communities. FFH is a CORE Group member.

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Abstract
The CORE Group's *Knowledge, Practice, Coverage (KPC) Survey Training Curriculum* provides trainer guidelines and participant handouts and resources to train field workers to carry out a KPC survey. The **KPC Trainer's Guide** includes three modules: *KPC Training Module 1: Training the Core Team*; *KPC Training Module 2: Training Supervisors and Interviewers;* and *KPC Training Module 3: Training the Post-Survey Analysis Team*. KPC Training Module 1 provides a set of learning sessions used to train the Core Team in the field to provide overall administration of the survey, including choosing the sample, preparing the survey instrument, and planning how to use results to inform program planning. KPC Training Module 2 provides a set of learning sessions used to train Supervisors and Interviewers in the field to choose respondents, administer the survey, and assure quality control. KPC Training Module 3 provides a set of learning sessions to train the Post-Survey Team to carry out data analysis, decision making based on results, and report writing.

CORE Group
300 I Street N.E.
Washington, DC USA 20002
www.coregroup.org

The CORE Group's *Knowledge, Practice, Coverage Survey Training Curriculum* includes three manuals:

1. KPC Training of Survey Trainers: Trainer's Guide and Participant's Manual and Workbook

2. KPC Survey Training: Trainer's Guides

   Module 1: Training the Core Team
   Module 2: Training Supervisors and Interviewers
   Module 3: Training the Post-Survey Analysis Team

3. KPC Survey Training: Participant's Manuals and Workbooks

   Module 1: Training the Core Team
   Module 2: Training Supervisors and Interviewers
   Module 3: Training the Post-Survey Analysis Team

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Private voluntary organizations (PVOs) with funding from the U.S. Agency for International Development (USAID) Child Survival and Health Grants Program have used the Knowledge, Practice, and Coverage (KPC) Survey instrument successfully to monitor and evaluate their health programs since the early 1990s. The survey was originally created by the Child Survival Support Program at Johns Hopkins University, and has subsequently been updated and revised by the Child Survival Technical Support Project (CSTS), based at ORC-Macro, and later by the CORE Monitoring and Evaluation Working Group. Numerous PVO staff have been trained in its use, and have trained many of their partner agencies.

The dream of the CORE Monitoring and Evaluation Working Group, under the leadership of the Working Group Chair, Juan Carlos Alegre, has been to institutionalize the training so that it can be more easily adapted locally and accessed by a wider audience of NGOs, consultants, training institutions and US and overseas universities. In 2001, Tom Davis, Julie Mobley and Phil Moses created a draft curriculum that was field tested with PVO field staff of several organizations in Cambodia, and repeated in 2002 with PVO Headquarters, field staff and consultants in Myrtle Beach, NC. Sandra Bertoli, David Shanklin, Jay Edison, Juan Carlos Alegre, and Sharon Tobing provided detailed feedback on how to improve this training.

The final version of the guide is due to the feedback of many people, and the special dedication and attention to detail of the following people. Bill Weiss, Tom Davis and Juan Carlos Alegre provided input into a revised table of contents. Freedom from Hunger was selected to rewrite the curriculum due to their extensive experience in the design and development of training materials in public health and adult learning. Robb Davis, Vicki Denman, Ellen Vor der Bruegge and Renee Charleston gave numerous hours to the development, writing and formatting of the curriculum. FANTA provided funding for this activity under the leadership of Bruce Cogill and coordination of Paige Harrigan. Jennifer Luna and Jay Edison representing the Child Survival Technical Support Plus Project and John Ssekamate-Ssebuliba from Makerere University led a field test at Makerere University in Uganda in 2004 that guided changes for the final draft. Ann Brownlee and Marcelo Castrillo provided detailed comments to several of the drafts to ensure its accuracy and ease of use. CORE staff Karen LeBan and Julia Ross provided input and overall support for the production of the document. Regina Doyle designed the cover.

In addition to those persons mentioned, we want to express our appreciation and gratitude to the many individuals and organizations who were not mentioned but who have used this methodology over the years and provided input into its improvement.

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KPC SURVEY TRAINING
FOR SUPERVISORS AND INTERVIEWERS

The **Supervisor/Interviewer Training** is designed for those individuals who will function as Supervisors and Interviewers during the actual KPC survey data collection. The team of Supervisors and Interviewers normally consists of 12 to 18 people in-country, made up of staff from the PVO, partners and the MOH. One (1) Supervisor and two (2) Interviewers usually form an Interview Team, although the ratio of Supervisor to Interviewer may vary. Supervisors may also be members of the Core Team.

Ideally, the individuals identified as Supervisors and Interviewers should have:

- experience participating in other surveys
- local language skills
- knowledge of maternal-child health or community health

The focus of this training workshop is to assure that all of the questions on the KPC Survey Questionnaire and the procedures for selecting both households and respondents are clearly understood by the participants. In addition, this training workshop provides an opportunity for Interviewers to practice interviewing skills and for Supervisors to practice supervision skills. The KPC survey is a population-based survey that is statistically valid and focuses on critical health indicators. To assure that the KPC survey is of high quality, it is essential to train both the Supervisors and Interviewers in the needed skills.

Participants in this training will:

- acquire an understanding of how the health data collected relates to the objectives of the project and the KPC survey
- review materials and information about logistics and timeframes for the KPC survey interviews
- review each question on the KPC Survey Questionnaire, the indicator each question is designed to measure, and why that particular indicator is considered important to the project
- gain experience through practice using the local events calendar, lexicon, Informed Consent Form, Quality Improvement Checklist, and adapted KPC Survey Questionnaire
- gain skills in supervision, interviewing and good survey techniques

The KPC Survey Trainer and the Core Team should conduct this training workshop and carry out a field test of the adapted KPC Survey Questionnaire. Ideally, the KPC Survey Trainer will have received the TOST KPC Survey Training and, in addition, the KPC Survey Trainer and the Core Team will have training and field experience in conducting KPC surveys and will possess knowledge of adult education principles.

This training workshop should be presented immediately <u>after</u> the training of the Core Team and immediately <u>before</u> conducting a KPC survey. This training is designed to take place over four (4) days, including one (1) day for conducting a field test. Additional time is required if the optional learning sessions for measuring height and MUAC are included. Ideally, the training workshop would be held at a training center near the project site with adequate space for Interviewers and Supervisors to work in both small groups and in plenary sessions. The advantages of being near the project are that 1) field tests can then be conducted in the appropriate language in-country and 2) the local events calendars and lexicon will more closely reflect the situation expected while conducting the survey.

Table of Contents

HOW TO USE THIS TRAINING CURRICULUM

How the Curriculum is Organized

This curriculum for training KPC Survey Supervisors and Interviewers contains standard symbols and fonts throughout the text that provide visual signals to help the Trainer identify: 1) key questions to ask, 2) information to transmit verbally or visually, and 3) information that is instructional only. In addition, an information box at the beginning of each learning session is designed to help the Trainer prepare to present the learning session. An explanation of the features of the learning sessions follows:

Learning Session Format

Each learning session begins with a:

Facilitator's Information Box—The box at the start of each learning session has up to six elements in it:

1. **Purpose**—the overall purpose of the learning session.
2. **Objectives**—list of actions (what participants will do) that the steps in the learning session are constructed to accomplish.
3. **Preparation/Materials**—list of actions or materials that you—the Trainer—must ensure are ready before the learning session can be presented. (For example, extra reading in the Field Guide will be listed that you, the Trainer, should complete before teaching the learning session.) These materials include Training Resources (TR), flip charts, and other materials. The materials needed for each learning session are listed with the step in which they occur. For example:

   Step X:
   - TR X: Title
   - TR XX: Title
   - Flip chart with title: XXX

   2-1

   Note: "TR 2-X" indicates that the content is included in the Participant's Manual and Workbook and you are encouraged to show the same content on a slide or overhead. The content of the Training Resources is not included in the Trainer's Guide. Rather, an icon like the one at the right indicates which TR to use. You will be given an electronic version of all of the Training Resources so you can create your own slide show or overheads.
4. **Time**—the estimated amount of time needed to implement all of the steps in the learning session.
5. **Steps**—a list of the steps needed to complete the learning session—the titles capture the process to be used and the content to be covered.

After the Facilitator's Information Box you will find:

- **Steps**—detailed instructions about how to proceed through each step. You are encouraged to adapt the suggested text to your style while assuring that all of the content is included and that the steps remain participatory and engaging. Special features for the Trainer to note include:
  - ***Italics font*** = instructions for the Trainer (not to be read to the trainees)
  - **Regular font** = specific information, instructions or questions for the Trainer to read or closely paraphrase to the trainees
  - **Arrow (➢)** = symbol that highlights specific questions to ask
  - **Box (❑)** = special technical or summary information to share with the trainees
  - **[Square brackets]** = the "correct" answer to expect from a technical question
  - **(Parenthesis)** = additional instructions or information

Learner Needs Assessment (LNA)

At least two weeks prior to the training workshop, the Trainer should prepare and have participants complete a Learner Needs Assessment (LNR) because the LNA is used by the Trainer to finalize the workshop design. Many trainers just assume they know what is needed in a learning event. Thus, they do not focus on the learner's needs, but on their own assumptions. The completed LNA should be used by the Trainer to fine-tune the training workshop by identifying skills and common themes that need to be addressed. Based on the LNA and decisions made by the Core Team, the Trainer can opt to omit or modify some learning sessions or to include the optional learning sessions to satisfy specific needs. The optional learning sessions are: Measuring Length/Height and Measuring MUAC.

The LNA can be carried out through written questionnaires, interviews, focus groups, e-mail, telephone conversations, etc. When conducting an LNA, let the individuals know why you are asking the questions, so that they understand that their ideas and opinions are valued. Some sample questions include:

LEARNER NEEDS ASSESSMENT FOR SUPERVISORS/INTERVIEWERS

Name ______________________________ E-mail: _________________________

Organization ______________________________ Telephone #: _________________________

1. In the past 2 years have you:
   a. Designed Knowledge, Practice & Coverage (KPC) Surveys? ☐ Yes ☐ No
   b. Implemented KPC surveys? ☐ Yes ☐ No
   c. Analyzed KPC surveys? ☐ Yes ☐ No

   If yes, please list surveys by project type (Child Survival, Food Aid, other?), date, and what role you played in each: ____

2. Have you ever been involved in translating a document to (*local language*)? ☐ Yes ☐ No

3. What is your experience with using an events calendar for estimating people's age? ___________

   ____

4. What is your experience with using a local lexicon to adapt a document to local terminology?

   ____

5. Have you had experience with conducting interviews for surveys? ☐ Yes ☐ No

   If "Yes," please explain: ____

6. Have you had experience in supervising survey staff in the field? ☐ Yes ☐ No

   If "Yes," please explain: ____

   ____

7. What experience do you have in taking anthropometric measurements (height/weight/MUAC)?

   ____

8. What languages do you speak fluently?____

9. Can you commit your time to complete the work needed for this survey? (This involves approximately 4 days for training and ___ days for KPC survey field work) ☐ Yes ☐ No

10. What is the most important thing you would like to learn during this training workshop?

    ____

Materials

All training materials are included in the Module 2 Participant's Manual and Workbook. Materials that must be prepared for each learning session are listed in the information box displayed at the beginning of each learning session as well as in the Table of Preparations (following "Preparation," below). The Trainer decides whether to use overheads, PowerPoint slides and/or handouts for each of the Training Resources (TRs). For all of the learning sessions, the Trainer should have available flip chart paper, markers, tape, and an overhead or PowerPoint projector and screen.

All participants should receive the Module 2 Participant's Manual and Workbook in a binder that contains the objectives, agenda, draft KPC Survey Questionnaire and all other Training Resources. If you want participants to have and use the extra readings, you will also need to provide them with a copy of the KPC 2000+ Field Guide.

Many of the Training Resources (TR) must be adapted and finalized before being included in the Module 2 Participant's Manual and Workbook, including the KPC Survey Questionnaire, the local lexicon, the events calendar, algorithm, and other items intended as guidance for the Supervisor/ Interviewer. These materials must be adapted based on decisions made by the Core Team during its training.

Preparation

Before beginning this training workshop, the Core Team needs to develop and/or adapt several key documents that are specific to the project and appropriate for the Supervisors and Interviewers training and for the field test. This adaptation process needs to be completed by the Core Team and includes the following:

- Completing the sampling plan, the algorithm for selecting households and respondents, the selection of clusters or communities, the calendar for KPC survey implementation and the specific personnel/staffing needs.

- Finalizing the KPC Survey Questionnaire and make sufficient photocopies to facilitate the review of the questionnaire by the Supervisors and Interviewers, practice using the questionnaire and the field test.

- Developing a one-page summary sheet of the KPC survey process, utilizing the sample format in **TR 2-3,** and develop a summary of project indicators, utilizing the sample format in **TR 2-8.**

- Deciding which nutritional indicators will be used in the KPC survey. If MUAC and/or height will be measured, add optional Learning Sessions 14 and/or 15 to the agenda.

- Field testing the KPC Survey Questionnaire. Prior to the training, organize a group of "respondents" similar to those included in the project to be interviewed during the field test. In addition, finalize the community location and logistics for conducting the field test.

- Finalizing the documents from the Module 1 learning sessions: Informed Consent Form, events calendar, lexicon, and translation of the KPC Survey Questionnaire.

On the final day of the workshop, a written evaluation **(TR 2-26)** should be used to elicit the participants' comments to use in improving the training process. Also, consider awarding participants a formal Certificate of Completion (not provided).

Sample Agenda for the Supervisor/Interviewer Training

Day 1	Learning Session	Time
1	Introduction to the KPC Survey Supervisor/Interviewer Training	25 minutes
2	The Purpose and Role of the KPC Survey	50 minutes
3	Role of the Core Team, Supervisors and Interviewers	60 minutes
4	Reviewing the KPC Survey Questionnaire	105 minutes
5	Selection of Households and Respondents	90 minutes
	Daily Evaluation	15 minutes
	Total:	**345 minutes** or 5 ¾ hours
Day 2		
	Question & Answer (about the previous day's work)	15 minutes
6	Proper Interviewing Techniques	105 minutes
7	Importance of Informed Consent and Confidentiality	30 minutes
8	Using Documentation and the Events Calendar	85 minutes
9	Giving Feedback Using the Quality Improvement Checklist	120 minutes
	Daily Evaluation	15 minutes
	Total:	**370 minutes or** 6 hours and 10 minutes
Day 3		
	Question & Answer (about the previous day's work)	15 minutes
10	Measuring Weight	180 minutes
11	Conducting Standardization Testing	180 minutes
12	Practicing Interviews	120 minutes
	Daily Evaluation	15 minutes
	Total:	**510 minutes or** 8 ½ hours
Day 4		
	Question & Answer (about the previous day's work)	15 minutes
13	Field Test and Revise the KPC Survey Instruments	360 minutes
	Evaluation and Closing	15 minutes
	Total:	**390 minutes or** 6 ½ hours)
Optional Learning Sessions:		
14	Measuring Length/Height	120 minutes
15	Measuring MUAC	60 minutes

Module 2 Learning Sessions
Table of Preparations

Learning Session	Handouts/Overheads/Slides	Other Preparation
1. Introduction to the KPC Survey Supervisor/Interviewer Training	▪ TR 2-1: Workshop Objectives ▪ TR 2-2: Workshop Agenda	♦ Prepare TR 2-1: Workshop Objectives and TR 2-2: Workshop Agenda based on the results of the Learner Needs Assessment (LNA) completed by participants prior to the workshop ♦ Review and confirm the workshop logistics ♦ Verify that the Core Team has completed its work on the **KPC Survey Questionnaire,** local lexicon and events calendar ♦ Prepare and post a welcome sign (not provided) ♦ Module 2 Participant's Manual and Workbook—1 copy for each participant. ♦ Extra Reading: KPC 2000+ Field Guide, pp. 79–89
2. The Purpose and Role of the KPC Survey	▪ TR 2-3: Summary of the KPC Survey Process	♦ Finalize TR 2-3: Summary of the KPC Survey Process (substitute specific information for the current survey in place of the wording in parentheses) ♦ Flip chart with title: *How the KPC Survey Data Can Be Used* ♦ Obtain a copy of all project objectives and indicators ♦ Prepare large "Objectives" signs—one sign for each project objective ♦ Prepare large "Indicator" cards—one card for each project indicator ♦ Extra Reading: KPC 2000+ Field Guide, pp. 1–9
3. Role of the Core Team, Supervisors and Interviewers	▪ TR 2-4: Roles of the Key KPC Survey Personnel ▪ TR 2-5: KPC Survey Supervisor's Role and Responsibilities ▪ TR 2-6: KPC Survey Interviewer's Role and Responsibilities	♦ Flip charts with titles: ♦ *Supervisor's Tasks* ♦ *Interviewer's Tasks* ♦ Extra Reading: KPC 2000+ Field Guide, pp. 79–84
4. Reviewing the KPC Survey Questionnaire	♦ TR 2-7: KPC Survey Questionnaire (developed by the Core Team) ♦ Local lexicon developed by the Core Team in Learning Session 24 of Module 1 ♦ TR 2-8: Project Indicators ♦ Make an extra copy of the KPC Survey Questionnaire for each participant (include or highlight only those questions to be used in	♦ Prepare a flip chart with title: Modifications to the KPC Survey Questionnaire ♦ Prepare and distribute any decision charts and extensive lists—e.g., vitamin A foods—Interviewers will need to help them remember specific information during the survey ♦ Prepare a role-play of asking the questions in a segment of the KPC Survey Questionnaire, identifying a group of questions that might be problematic to record (with skips, reading responses, etc.). Think through the kinds of

Learning Session	Handouts/Overheads/Slides	Other Preparation
	the role-play)	mistakes an Interviewer might make in asking the questions and recording the answers. Identify a volunteer to act as the respondent. ♦ Prepare a large flip chart with the same KPC survey questions you use in the role-play—allow room to record the responses ♦ Extra Reading: KPC 2000+ Field Guide, pp. 32–36
5. Selection of Households and Respondents	▪ TR 2-9: Decision Chart for Selection of Households and Respondents ▪ TR 2-10: Guidelines for Random Selection of Households ▪ TR 2-11: Selecting an Individual for the Interview	♦ Prepare TR 2-9: Decision Chart for Selection of Households and Respondents (Use the algorithm developed by the Core Team during Learning Session 14 of Module 1.) ♦ Ask the Core Team to prepare a role-play about using the decision chart in the "village" ♦ Prepare signs for the mock village to designate a church, stores, households, etc. ♦ Assemble approximately 35 chairs or small desks ♦ Prepare six separate flip charts that show six household composition scenarios—they must be of two kinds: 1) those that meet the survey criteria, containing households with people who should be sampled and 2) those that do not meet the criteria: different age, gender or family relationship than needed; empty house; informant absent or far away; cannot find informant within 30 minutes of searching, etc. ♦ Extra Reading: KPC 2000+ Field Guide, pp. 37–78
6. Proper Interviewing Techniques	▪ TR 2-12: Proper Interviewing Techniques	♦ Flip chart with title: *Ideas for Effective Interviews*
7. Importance of Informed Consent and Confidentiality	▪ TR 2-13: Reasons for Confidentiality ▪ TR 2-14: Informed Consent Form (adapted by the Core Team during Core Team training)	♦ Flip charts with titles: ♦ *Reasons for Informed Consent* ♦ *Why Confidentiality Is Important*
8. Documentation and the Events Calendar	▪ TR 2-15: Documentation Required for the KPC Survey Questionnaire ▪ TR 2-16: Events Calendar	♦ Obtain samples of health cards, birth certificates or other documentation that a typical respondent may produce. Prepare copies of these documents according to instructions found at the end of this learning session. ♦ Write probable birth dates for children under two years of age on small slips of paper for practice in using the events calendar (two or three slips with dates for each participant) Write dates such as 14 April 2004 or 10 May 2003. ♦ Flip charts with titles:

Learning Session	Handouts/Overheads/Slides	Other Preparation
		♦ *How to Record Data* ♦ *Instructions for Document Review and Use* ♦ *Solving Common Errors* ♦ Draft Events Calendar—Children
9. Giving Feedback Using the Quality Improvement Checklist	▪ TR 2-17: Quality Improvement Checklist ▪ TR 2-18: Checking for Errors in the Field ▪ TR 2-19: Daily Interview Form ▪ TR 2-20: Giving Feedback ▪ TR 2-21: Instructions for the Triad Activity	♦ Flip charts with titles: ♦ *Potential Problems During Interviews* ♦ *Receiving Feedback* ♦ One copy of TR 2-7: KPC Survey Questionnaire (from Learning Session 4) for each participant ♦ One copy of TR 2-17: Quality Improvement Checklist for each participant ♦ Prepare several sets of signs to designate roles—a "set" is three signs: Interviewer, Respondent, and Supervisor. To determine the number of sets needed, divide the total number of participants by three. ♦ Extra Reading: KPC 2000+ Field Guide, pp. 85–89
10. Measuring Weight	▪ TR 2-22: Taking a Child's Weight ▪ TR 2-23: Protocol for Taking Weights	♦ Obtain anthropometry measurement tools (scales, weighing pants, baby slings, two dolls—one about the size of an infant, the other about the size of a two-year-old child. If dolls are not available, use sacks of flour, etc.) ♦ Flip chart with title: *Equipment/Personnel Needs*
11. Conducting Standardization Testing	▪ TR 2-24: Standardization Test Form	♦ Obtain anthropometry measurement tools (height board, length board, MUAC tapes, scales, weighing pants, baby slings), depending on the indices to be used for the survey ♦ Arrange for a group of children to be present so that measurements can be practiced and a Standardization Test can be completed ♦ Read the Instruction for Standardization Testing and Sample Summary Data Sheet at the end of this learning session ♦ Copy of the Summary Data Sheet for Standardization Tests (see the last page of this learning session)
12. Practicing Interviews		♦ Signs to designate roles: Interviewer, Respondent, Supervisor (from Learning Session 9) ♦ One copy of TR 2-7: KPC Survey Questionnaire (from Learning Session 4) for each participant ♦ 1copy of TR 2-17: Quality Improvement Checklist (Session 9) for each participant ♦ TR 2-21: Instructions for the Triad Activity

Learning Session	Handouts/Overheads/Slides	Other Preparation
		(from Learning Session 9) (for reference only) ♦ TR 2-20: Giving Feedback (from Learning Session 9) (for reference only) ♦ Organize a group of "interviewees" in a nearby community similar to those included in your program to be interviewed the following day during the field test ♦ Finalize all logistical arrangements for the field test and be prepared to share those arrangements with participants
13. Field Test and Revise the KPC Survey Instruments	▪ TR 2-25: Workshop Evaluation	♦ Confirm the preparations made regarding location and logistics for a field test ♦ 2 copies of TR 2-17: Quality Improvement Checklist for each participant ♦ 4 copies of TR 2-7: KPC Survey Questionnaire for each participant ♦ Assemble equipment (scales, hanging pants and slings, length boards, etc.) for measuring weight, height and/or MUAC—depending on the objectives of the project ♦ Clipboards, pens, water, other supplies for completing the field work ♦ 1 copy of the Lexicon for each participant ♦ 1 copy of the Events Calendar for each participant ♦ Certificates (optional)
14. Measuring Length/Height (Optional)	▪ TR 2-26: Diagrams for Length/Height Measurements ▪ TR 2-27: Protocol for Length/Height Measurements	♦ Height board, length board, recording form ♦ If possible obtain dolls or other objects of various lengths/heights to use in practice ♦ If possible, arrange for a group of children to be present for practicing measurements
15. Measuring MUAC (Optional)	▪ TR 2-28: Diagrams for Measuring MUAC ▪ TR 2-29: Protocol for MUAC Measurements	♦ Assemble MUAC tapes and recording forms ♦ Dolls of various sizes, balloons, or just use participants' arms for practice ♦ Arrange for a group of children to be present for practicing measurements

ACRONYMS

CS	Child Survival
DOB	Date of Birth
DIP	Detailed Implementation Plan
FG	KPC 2000+ Field Guide
HA	Height-for-Age
KG	Kilograms
KPC	Knowledge, Practice and Coverage Survey
LNA	Learner Needs Assessment
LQAS	Lot Quality Assurance Sampling
MOH	Ministry of Health
MUAC	Mid-Upper Arm Circumference
PVO	Private Voluntary Organization
Q&A	Question and Answer
QI	Quality Improvement
SA	Supervision Area
TR	Training Resource
TT	Tetanus Toxoid Vaccination
USAID	United States Agency for International Development
WA	Weight-for-Age
WH	Weight-for-Height

1. Introduction to the KPC Survey Supervisor/Interviewer Training

Purpose:
To orient participants to the objectives and logistical aspects of the training workshop.

Objectives:
By the end of this learning session, participants will have:
1. Received clarification of the workshop objectives and discussed any logistical concerns.
2. Examined the basic materials used during the training workshop.

Preparation/Materials:
- Prepare **TR 2-1: Workshop Objectives** and **TR 2-2: Workshop Agenda** based on the results of the Learner Needs Assessment (LNA) completed by participants prior to the workshop (see the Sample Agenda for the Supervisor/Interviewer Training)
- Review and confirm the workshop logistics
- Verify that the Core Team has completed its work on the **KPC Survey Questionnaire,** local lexicon and events calendar

Step 1:
  - Prepare and post a welcome sign (not provided)
  - **TR 2-1: Workshop Objectives**

Step 2:
  - **TR 2-2: Workshop Agenda**

Step 3:
  - Make one (1) copy for each participant of Module 2 Participant's Manual and Workbook—.

- Extra Reading: KPC 2000+ Field Guide, pp. 79–89

Time:
25 minutes

Steps:
1. Welcome the participants and review the workshop objectives – 5 minutes
2. Review the workshop agenda and logistics – 10 minutes
3. Introduce the workshop materials – 10 minutes

Steps

1. **Welcome the participants and review the workshop objectives** – 5 minutes

   *Provide a brief welcome to the participants. Refer participants to **TR 2-1: Workshop Objectives.** Review the objectives and point out to participants one or two examples of how the workshop design and objectives are based on the results of the LNA previously completed by participants.*

   2-1

2. **Review the workshop agenda and logistics** – 10 minutes

   *Refer participants to **TR 2-2: Workshop Agenda.** Review the agenda, including the timing for the field test, lunch and breaks. Clarify all plans related to logistics, including lodging, meals, per diem, transportation, etc. Prompt for questions until all issues are resolved.*

   2-2

3. **Introduce the workshop materials** – 10 minutes

   Distribute the Module 2 Participant's Manual and Workbook to each participant. Review the manual and explain how the Training Resources (TR) are numbered throughout the manual. Ask:

   - **What questions do you have about how we are going to work together during the next four days?**

   Respond to questions and clarify information.

2. Purpose and Role of the KPC Survey

Purpose:
To familiarize Supervisors/Interviewers with the KPC survey process and the use of indicators to measure change over time and to instill an appreciation of the importance of the information they are collecting.

Objectives:
By the end of this learning session, participants will have:
1. Compared the objectives of the project with the indicators that are going to be used to find out if the objectives are achieved.
2. Identified the uses of the data collected.

Preparation/Materials:
Step 1:
- Finalize **TR 2-3: Summary of the KPC Survey Process** (substitute specific information for the current survey in place of the wording in parentheses)

Step 2:
- Prepare a flip chart with title: How the KPC Survey Data Can Be Used

Step 3:
- Obtain a copy of all project objectives and indicators
- Prepare large "Objectives" signs—one sign for each project objective
- Prepare large "Indicator" cards—one card for each project indicator

- Extra Reading: KPC 2000+ Field Guide, pp. 1–9

Time:
50 minutes

Steps:
1. Present a summary of the KPC survey process – 20 minutes
2. Discuss the utilization of the data – 10 minutes
3. Play a matching game to link the objectives with the indicators – 20 minutes

Steps

1. Present a summary of the KPC survey process – 20 minutes

In this learning session, we are going to define what we mean by a KPC survey and explore its purpose and role. Let us first answer the question:

- **What is a KPC survey?**

Ask several volunteers to respond. Refer participants to ***TR 2-3: Summary of the KPC Survey Process.*** *Review its contents and ask for comments or questions.*

2-3

Think of your experiences implementing KPC surveys or similar survey work:

- **What was your role in prior KPC surveys?**

- **In a KPC survey, who is interviewed and why?** *[Mothers and caregivers, because the KPC survey questions generally relate to results at the individual level and focus on behavior change that affects the health and survival of children.]*

- **When is a KPC survey used within a Child Survival project cycle?** *[Normally at baseline and final, sometimes at mid-term. It can be accompanied by other tools both for measuring change at different levels and for monitoring change throughout the cycle.]*

- **What questions do you have concerning the process of conducting a KPC survey?**

2. **Discuss the utilization of the data** – 10 minutes

Post the flip chart below:

How the KPC Survey Data Can Be Used

Ask:

- **How can the KPC survey data be used in the project?** *[To measure change over time, to improve the management of the project, to determine the success of interventions in creating change, to more carefully target messages to meet local needs.]*

Write the participants' ideas on the flip chart. Summarize their ideas and point out that the project success is dependent on the quality of the information collected during KPC survey.

3. **Play a matching game to link the objectives with the indicators** – 20 minutes

Post the signs representing each project objective, leaving enough room for the "indicator" cards to be posted beneath each "objective" sign. Hold up each indicator card, one at a time, and ask which objective the participants think the indicator measures. Post the indicator card under the objective they choose. (Note: If they choose incorrectly, guide the discussion until the correct answer is reached. Then move the indicator card under the correct objective.) Explain that we will be comparing the project indicators with the KPC survey questions during a future learning session.

Explain that the KPC survey is a tool used for measuring these indicators but that not all objectives and indicators are measured by the KPC survey; other tools are also used during project implementation. Allow time for questions and to clarify information.

3. Role of the Core Team, Supervisors and Interviewers

Purpose:
To understand the roles of the key staff in the KPC Survey process.

Objectives:
By the end of this learning session, participants will have:
1. Reviewed a list of tasks that key personnel need to accomplish to complete the KPC survey.
2. Discussed the various tasks for which Supervisors and Interviewers are responsible.
3. Listed how the Supervisor and Interviewer are involved in maintaining good quality data.

Preparation/Materials:
Step 1:
- **TR 2-4: Roles of the Key KPC Survey Personnel**

Step 2:
- Prepare a flip charts with titles: Supervisor’s Tasks and Interviewer’s Tasks
- **TR 2-5: KPC Survey Supervisor’s Role and Responsibilities**
- **TR 2-6: KPC Survey Interviewer’s Role and Responsibilities**

- Extra Reading: KPC 2000+ Field Guide, pp. 79–84

Time:
60 minutes

Steps:
1. Review the roles of the principal staff – 10 minutes
2. Identify the specific roles of Supervisors and Interviewers – 30 minutes
3. Summarize the relationship among KPC survey staff – 20 minutes

Steps

1. Review the roles of the principal staff – 10 minutes

Introduce the purpose of the learning session:

> It is important to define the roles of the key staff in the KPC survey process so you will have clear idea of the responsibilities of each member of the survey team.

2-4

*Refer to **TR 2-4: Roles of the Key KPC Survey Personnel.** Review the handout together and clarify any questions.*

2. Identify the specific roles of Supervisors and Interviewers – 30 minutes

Divide participants into 2 groups: one group of Supervisors and one group of Interviewers. (Core Team members can be interspersed between the two groups.)

Provide each group with the appropriate flip chart: Supervisor’s Tasks or Interviewer’s Tasks.

Supervisor's Tasks

Interviewer's Tasks

*Give them 10 minutes to list on the flip chart those specific tasks that they (as Supervisors or as Interviewers) should accomplish during the KPC survey. When the groups finish, refer them to TR 2-5: KPC Survey Supervisor's Role and Responsibilities and **TR 2-6: KPC Survey Interviewer's Role and Responsibilities.***

2-5

2-6

Ask volunteer(s) to read the list. Ask participants how their list of tasks compares with the handout and if they have any adjustments or additional tasks to add to the handout.

Ensure that all Supervisors and Interviewers clearly understand the importance of all of the tasks, including any newly added tasks.

3. **Summarize the relationships among KPC survey staff –** 20 minutes

Ask:

- **Why it is important that KPC survey Interviewers report to Supervisors?**
- **What steps are taken to ensure that the information collected during the KPC survey is of the highest quality?**

Mention the following points, if the participants do not mention them:

- Ensure the correct selection of the sample in the community and the household. This avoids potential biases in the data collected.
- Ensure that the survey information is complete. This avoids return trips to the community to collect missing data.
- Ensure that all Interviewers use the same guidelines when entering and recording data on the survey instrument. This ensures accurate results.
- Ensure that good interviewing techniques are used and that each Interviewer asks each question exactly the way other Interviewers ask the question. This results in data being collected correctly so that findings will be valid.

Randomly divide the participants into three groups. Provide each group with flip chart paper and markers and instruct them to draw a picture that illustrates the relationship between the Core Team, Supervisors and Interviewers. Give them ten minutes to complete their drawing and have them post it on the wall near where they are working. Ask the participants to rotate to each drawing to view the ideas and to ask questions for clarification.

Summarize the learning session by saying:

It is important that everyone be 100% committed to the KPC survey process. The role of each person may vary, depending on the type of survey. However, during any particular survey, it is VERY IMPORTANT that every individual be clear about his/her role and that THE ROLE OF EVERY SUPERVISOR IS THE SAME and THE ROLE OF EVERY INTERVIEWER IS THE SAME in order to minimize bias.

4. Reviewing the KPC Survey Questionnaire

Purpose:
To provide an opportunity for the Supervisors and Interviewers to review and understand the KPC Survey Questionnaire in detail.

Objectives:
By the end of this learning session, participants will have:
1. Reviewed the KPC Survey Questionnaire in detail.
2. Analyzed and added to the local lexicon to standardize the meaning of the survey questions and to facilitate translation.
3. Observed a role-play between an Interviewer and respondent.

Preparation/Materials:
Step 1:
- **TR 2-7: KPC Survey Questionnaire** (developed by the Core Team)
- Local lexicon developed by the Core Team in Learning Session 24 of Module 1
- Prepare a flip chart with title: Modifications to the KPC Survey Questionnaire
- Prepare and distribute any decision charts and extensive lists—e.g., vitamin A foods—Interviewers will need to help them remember specific information during the survey
- **TR 2-8: Project Indicators**

Step 2:
- Prepare a role-play of asking the questions in a segment of the KPC Survey Questionnaire, identifying a group of questions that might be problematic to record (with skips, reading responses, etc.). Think through the kinds of mistakes an Interviewer might make in asking the questions and recording the answers. Identify a volunteer to act as the respondent.
- Prepare a large flip chart with the same KPC survey questions you use in the role-play—allow room to record the responses
- Make an extra copy of the **KPC Survey Questionnaire** for each participant (include or highlight only those questions to be used in the role-play)
- Prepare the role play and flip chart for use in the role-play

- Extra Reading: KPC 2000+ Field Guide, pp. 32–36

Time:
105 minutes

Steps:
1. Read the KPC Survey Questionnaire and consider the local lexicon – 90 minutes
2. Conduct a role-play about an Interviewer not following KPC survey instructions – 15 minutes

Steps

1. Read the KPC Survey Questionnaire and consider the local lexicon – 90 minutes

*Refer participants to **TR 2-7: KPC Survey Questionnaire** developed by the Core Team. Explain the basic format (topic areas included, measurements required, etc.) of the questionnaire. Ask volunteers to take turns reading the questions. After each question, pause to:*

2-7

- *explain why the question is included in the KPC survey.*

- *talk about the types of answers that can be expected for the question.*

- *explain any changes that were made while developing the local lexicon. Ask for input from the participants inquiring if they feel the meaning of the question is clear and if the word choice is appropriate or if another word or words are needed. Note any changes on the flip chart so that the* ***KPC Survey Questionnaire*** *can be modified at the end of the training workshop.*

Modifications to the KPC Survey Questionnaire

Be sure to distribute and review any decision charts and extensive lists—e.g., vitamin A foods—that Interviewers will need as additional information to help them remember the specific terms during the survey.

Point out and give examples about how to follow the Interviewer's instructions written into the survey (skips and go-to's, single and multiple answers, etc.). Make sure each instruction is understood by providing an example (i.e., "Your respondent says the baby had diarrhea last month….") and then:

1) *ask for a volunteer to explain how to write the response on the survey, and*
2) *what the next question should be.*

Tell the Interviewers that when there is a skip, the Interviewer must put a big "X" through the questions that are skipped (to show that the questions were not just overlooked).

(Note: If different questionnaires are used for different types of respondents, all questionnaires should be reviewed.)

Refer participants to ***TR 2-8: Project Indicators.*** *Review a few examples of how the questions correspond with the previously discussed project indicators.*

2-8

2. **Conduct a role-play about an Interviewer not following KPC survey instructions** – 15 minutes

The Trainer should play the part of the Interviewer in the following role-play. Give the participants a copy of the questions you are using and ask them to record the answers as they hear them.

During the role-play, record the answers on the flip chart you prepared, rather than on an interview form so everyone can see the process.

KPC Survey Questions
(to demonstrate incorrect questioning and recording)

(Note: Prepare this flip chart in advance. List a number of questions from the KPC Survey Questionnaire for the role-play. Allow room for recording the responses during the role-play.)

Throughout the role-play, the Trainer purposely includes mistakes that occur from not following the instructions:

- *missing "go to" instructions*
- *not asking for multiple responses when appropriate*
- *not utilizing exact wording*
- *making mistakes in recording what is said*
- *not writing "no data" when appropriate*
- *leaving cells blank that should be filled*
- *not making skips when they are called for*
- *making appropriate skips but not using a big "X" to show questions that were not asked*
- *entering data incorrectly, etc.*

After the role-play, ask participants to identify the mistakes that the Trainer made while asking the questions and recording answers on the ***KPC Survey Questionnaire.*** *Continue asking for volunteers until all of the mistakes made during the role-play are identified.*

Summarize the learning session by asking the participants to continue reviewing the questionnaire during their free time, as they will begin practicing the use of the questionnaire after looking at how to select the proper households and respondents.

5. Selection of Households and Respondents

Purpose:
To learn the correct procedures for selecting households and respondents when the Interview Team reaches the community.

Objectives:
By the end of this learning session, participants will have:
1. Reviewed the concept of random sampling and the decision chart.
2. Demonstrated how to select the first household.
3. Practiced the methodology used to select community households to participate in the KPC survey.
4. Discussed the selection of survey respondents within households.

Preparation/Materials:
Step 1:
- Prepare **TR 2-9: Decision Chart for Selection of Households and Respondents** (Use the algorithm developed by the Core Team during Learning Session 14 of Module 1.

Step 2:
- **TR 2-10: Guidelines for Random Selection of Households**

Step 3:
- Ask the Core Team to prepare a role-play about using the decision chart in the "village" to select the first household
- Prepare signs for the mock village to designate a church, stores, households, etc.
- Assemble approximately 35 chairs or small desks
- Prepare six separate flip charts that show six household composition scenarios—they must be of two kinds: 1) those that <u>meet</u> the survey criteria, containing households with people who should be sampled and 2) those that <u>do not meet</u> the criteria: different age, gender or family relationship than needed; empty house; informant absent or far away; interviewer cannot find informant within 30 minutes of searching, etc.

Step 4:
- **TR 2-11: Selecting an Individual for the Interview**

- Extra Reading: KPC 2000+ Field Guide, pp. 37–78

Time:
90 minutes

Steps:
1. Present the concept of random sampling and the "decision chart" – 20 minutes
2. Review the procedure for selecting the first household – 10 minutes
3. Demonstrate sampling by using a mock "village" – 40 minutes
4. Discuss how to select individuals to be interviewed – 20 minutes

Steps

1. **Present the concept of random sampling and the "decision chart"** – 20 minutes

   Explain:

The Core Team has already selected the communities in which interviews will be conducted. However, you—as Supervisors and Interviewers—have a very important role in ensuring the random selection of the households and the respondents in the communities you are assigned.

Random selection means that every household in the community has an equal chance of being selected. To make sure that all of the households have an equal chance, an algorithm or "decision chart" has been developed to show you exactly how to select the household and respondent once you arrive in the community. Both the Supervisor and the Interviewer are responsible for following these guidelines exactly. It is extremely important that everyone follow the exact same procedure for selecting households and respondents.

Depending on whether the project will use LQAS Sampling or Cluster Sampling, explain that only one respondent is needed for LQAS Sampling but ten respondents are needed for Cluster Sampling. In both cases, the procedure for random sampling is the same.

2-9

Refer participants to ***TR 2-9: Decision Chart for Selection of Households and Respondents.*** *Review this decision chart with participants, discussing various examples of situations that may arise during sampling for the survey. Emphasize that the Core Team has randomly selected the clusters or communities to survey, and that the Supervisors will be responsible for randomly selecting the first (or in LQAS, the only) household. Interviewers will be responsible for selecting subsequent households and respondents.*

2. **Review the procedure for selecting the first household** – 10 minutes

2-10

Refer the participants to ***TR 2-10: Guidelines for Random Selection of Households.*** *Ask participants to take turns reading sections aloud. Review the section of* ***TR 2-9: Decision Chart for Selection of Households and Respondents*** *that corresponds to first household selection.*

Ask:

- **What questions do you have about randomly selecting the first household in a community?**

3. **Demonstrate sampling by using a mock "village" –** 40 minutes

Ask the participants to help you arrange the room into a "village." Place signs on the chairs or desks to label a church, stores, and households. Include at least 30 chairs scattered in the room to represent households in the "village."

Have the Core Team present their role-play about using the decision chart for selecting the first household. When they finish, ask what questions the Supervisors or Interviewers have about the Supervisor's role.

After you complete the practice sampling exercise, change the "village" around and ask for a volunteer to be guided through the same sampling activity by the group. After the first house is selected, ask the group to guide the volunteer through selecting the next household (if using cluster sampling) by locating the nearest front door to the first household.

Place the six flip charts that show different household composition scenarios on chairs around the room. Ask different participants to explain what they would do if they visited each household.

Ask:

- ➢ **What questions do you have about this sampling exercise?**

Respond to any questions or concerns.

4. **Discuss how to select individuals to be interviewed** – 20 minutes

Reiterate which individual in the household should be interviewed based on earlier decisions by the Core Team regarding the target population for the survey. Also define what a "household" is in terms of the survey. Review the decision chart for selecting the respondents.

2-11

*Refer participants to **TR 2-11: Selecting an Individual for the Interview.** Have each person work individually for 5 minutes to fill in the blanks with their ideas for selecting respondents. After everyone has finished, go over the answers and make sure that everyone is in agreement.*

Emphasize that there is no one right way to conduct a survey; the important thing is that everyone participating in a KPC survey follow exactly the same procedure for selecting households and respondents. When in doubt, always be random.

TR 2-11: Selecting an Individual for the Interview
(Possible Answers)

1. In this survey, we define a household as:
[Possible definitions include: all people sharing the same cooking pot; a man and all his wives and children, and their cluster of houses; all the people dependent on the same wage earner; etc.]

2. The person (or persons) to be interviewed for this survey is (are):
[Possible answers include: pregnant women or lactating mothers; mothers with children under two; the head of a family with one or more members diagnosed with TB; all women of reproductive age; etc.]

3. If the household you selected has more than one person meeting this definition, you must:
[Possible answers include: randomly select the woman and select the youngest child.]

4. If the person meeting the criteria for selection is not at home you must:
[Possible answers include: Find out when that person will return and schedule an interview; return later; wait 30 minutes maximum; go look for the person; or, if this is not possible, select the nearest household as an alternate.]

5. If there is no one that meets this definition in the household, you must:
[Possible answers include: Select the next household by identifying the house with the nearest doorway, then asking if an individual in that household meets the criteria to be interviewed.)

6. Proper Interviewing Techniques

Purpose:
To identify proper interviewing techniques and practice using the KPC Survey Questionnaire.

Objectives:
1. By the end of this learning session, participants will have:
2. Developed a list of proper interviewing techniques.
3. Discussed improper interviewing techniques.
4. Practiced proper interviewing techniques.

Preparation/Materials:
Step 1:
- Flip chart with title: Ideas for Effective Interviews
- **TR 2-12: Proper Interviewing Techniques**

Time:
105 minutes (1 hour and 45 minutes)

Steps:
1. List proper interviewing techniques – 30 minutes
2. Discuss improper interviewing techniques – 15 minutes
3. Practice interviewing in pairs as Interviewer and Respondent – 60 minutes

Steps

1. List proper interviewing techniques – 30 minutes

Say:

After you have selected the proper person to interview, let us look at how to interview that person. Turn to the person seated next to you and discuss what factors are most important in proper interviewing. For example, one technique might be to "speak loudly and clearly," or another might be to "make eye contact with the respondent."

After one or two minutes, ask for volunteers to suggest some proper interviewing techniques. List their ideas on the flip chart.

Ideas for Effective Interviews

*After a few ideas are listed on the flip chart, refer to **TR 2-12: Proper Interviewing Techniques.** Ask participants to take turns reading each point. Compare the flip chart list with **TR 2-12.***

2-12

2. Discuss improper interviewing techniques – 15 minutes

Ask the participants to turn to the same partner to brainstorm about improper techniques. Then ask for volunteers to give some examples. Summarize by pointing out what to avoid when *interviewing and state that now they will have the opportunity to practice using the **KPC Survey Questionnaire** with good interviewing techniques.*

3. Practice interviewing in pairs as Interviewer and Respondent – 60 minutes

*Divide the participants into pairs. Explain that participants will now have an opportunity to practice using the **KPC Survey Questionnaire.** Have one person in each pair assume the role of Interviewer and the other the role of the respondent. Ask the pairs to complete the questionnaire, then switch roles and repeat the exercise.*

*Now that participants have had a chance to work with the **KPC Survey Questionnaire,** ask:*

- **What questions, problems or concerns do you have with anything on page 1 of the KPC Survey Questionnaire?**

Clarify and respond to questions and move on to page 2. Ask the same question for each page of the questionnaire. When questions arise concerning documentation, anthropometrics, etc., use the opportunity to review the agenda and point out that these points will be covered in later learning sessions.

When all of the questions, problems and concerns have been discussed, close the learning session.

7. Importance of Informed Consent and Confidentiality

Purpose:
To learn protocols for informed consent and confidentiality and to review the negative consequences that a breach of confidentiality may have on the quality of the data, the credibility of the project, and the respondents themselves.

Objectives:
By the end of this learning session, participants will have:
1. Identified why it is important to obtain informed consent.
2. Explored possible negative consequences of a breach in confidentiality.
3. Practiced reading and explaining the Informed Consent Form.
4. Discussed techniques for achieving privacy and maintaining confidentiality.

Preparation/Materials:
Step 1:
- Prepare a flip chart with title: Reasons for Informed Consent
- Prepare a flip chart with title: Why Confidentiality Is Important
- **TR 2-13: Reasons for Confidentiality**

Step 2:
- **TR 2-14: Informed Consent Form** (adapted by the Core Team during the Core Team training)

Time:
30 minutes

Steps:
1. Discuss the importance of informed consent and confidentiality – 10 minutes
2. Read and explain the Informed Consent Form – 10 minutes
3. Discuss how Interviewers can maintain respondents' privacy confidentiality – 10 minutes

Steps

1. Discuss the importance of informed consent and confidentiality – 10 minutes

Ask:

- **Why is it important to ask respondents if they want to participate in the survey?**

Brainstorm the reasons and write their responses on the flip chart.

Reasons for Informed Consent

Ask:

- **How does keeping the responses confidential (private) help the project, the quality of the data and the respondents themselves?**

Write their responses on the flip chart.

Why Confidentiality Is Important

*Refer participants to **TR 2-13: Reasons for Confidentiality.** Compare the lists. Ask participants to add any of the newly identified reasons to the handout.*

2-13

2. **Review and explain the Informed Consent Form –** 10 minutes

*Refer to **TR 2-14: Informed Consent Form** (adapted by the Core Team during their training). Invite a participant to read the form aloud. Stress that the Informed Consent Form must be read exactly as written. Ask:*

2-14

- **What questions do you have about the Informed Consent Form?**

3. **Discuss how Interviewers can maintain respondents' privacy and confidentiality –** 10 minutes

Ask:

- **How can Interviewers maintain privacy and confidentiality during the interviews?** *[Politely ask onlookers to leave; move to a more secluded space; explain that you are interested in only the respondent's replies. Interviewers should never discuss with other people what respondents say. If another person is interfering with the interview, ask another Interview Team member to hold a discussion or conduct an "interview" with that individual (but do not include that interview in the sample).]*

Summarize the group's ideas and reiterate the importance of allowing people to refuse to participate and to never discuss individual responses with other people.

Say:

Imagine that your target group for the KPC survey is mothers and an Interviewer on your Interview Team arrives at a house in your project area to find a number of men, women and children present in the house.

- **What can the Interviewer do to ensure that the mother's responses are confidential (private), without offending the other people or making the mother uncomfortable?**

After two or three ideas, make the following points:

It is very important that other mothers who might also be interviewed do not hear the responses of mothers interviewed first. Interviewers should use their own judgment as to how comfortable the mother appears in responding to questions with other people around and whether it is likely to influence her answers.

8. Using Documentation and the Events Calendar

Purpose:
To convey that accuracy of information is critical, to emphasize the importance of documentation and to stress the requirement for using a local events calendar when documentation is not available to determine the age of the child.

Objectives:
By the end of this learning session, participants will have:
1. Observed the documentation expected to be found in the field.
2. Noted questions that require documentation and how the documentation provided is recorded on the KPC Survey Questionnaire.
3. Identified and analyzed common problems with documentation.
4. Enhanced the contents of the events calendar.
5. Practiced the use of an events calendar.

Preparation/Materials:
Step 1:
- Obtain samples of health cards, birth certificates or other documentation that a typical respondent may produce. Prepare copies of these documents according to instructions found at the end of this learning session.
- Write probable birth dates for children under two years of age on small slips of paper for practice in using the events calendar (two or three slips with dates for each participant) Write dates such as 14 April 2004 or 10 May 2003.
- Prepare a flip chart with title: How to Record Data
- **TR 2-15: Documentation Required for the KPC Survey Questionnaire**
- Prepare a flip chart with title: Instructions for Document Review and Use
- Prepare a flip chart with title: Solving Common Errors

Step 2
- Prepare a flip chart with title: Draft Events Calendar—Children
- **TR 2-16: Events Calendar**

Time:
85 minutes

Steps:
1. Review documentation and practice recording the necessary information – 50 minutes
2. Enhance the local events calendar – 10 minutes
3. Practice using the events calendar – 25 minutes

Steps

1. **Review documentation and practice recording the necessary information** – 50 minutes

   Explain the importance of documentation. Stress the need for obtaining and recording the most accurate information possible so that the KPC survey results are of high quality.

   Show the samples of the different types of documentation that are needed (health cards, birth certificates, etc.) and discuss the information that is needed and gathered by the Interviewer from each type of document. Discuss which KPC survey questions require documentation. Write the *numbers of those questions down the left side of the flip chart. Show exactly how to record the required information by writing out the desired format next to each question number.*

How to Record Data

1.
2.
3.
etc.

Refer participants to ***TR 2-15: Documentation Required for the KPC Survey Questionnaire.***

2-15

Explain the procedure to follow if documentation is not available (e.g., if it is locked up, the card is lost, a different card is produced, etc). If information is missing, ask the Interviewers to write "no data" next to that cell on the ***KPC Survey Questionnaire*** *so that the Supervisor knows that the question was not overlooked. Also, if the Interviewers think that the data may be incorrect, they should write the information to the side with a note saying "bad data" so the Supervisor can determine how to proceed in that situation. Explain that when no documentation is available to accurately determine the age of children, the Interviewer should use an events calendar.*

Form three to five small groups. Give each group several of the sample documents you have made showing common errors (see ***Instructions for Preparing Documentation*** *at the end of this learning session). Post the flip chart. Review the instructions briefly, and give the groups 15 minutes to complete the steps shown and to answer the questions posed:*

Instructions for Document Review and Use

1. Review the sample documents.
2. Determine which documents contain information that appears to be <u>incorrect</u>.
3. Decide on the correct response/procedure:

- **What can you do to help inusre that you obtain the correct information?**
- **If you cannot obtain the correct information, how should you record the lack of correct information on the KPC Survey Questionnaire?**

After the groups complete the task, ask for a volunteer from one group to share one document, identify what the error is and suggest how the group proposes to respond to the problem and how to record the situation on the ***KPC Survey Questionnaire.*** *Ask if all of the groups agree with the solution.*

Continue asking for volunteers from different groups until all of the documents have been covered.

Write the correct procedure for each example on the flip chart. Ask participants to copy down the information to remind themselves of the correct procedures.

Solving Common Errors		
Document	**Error**	**How to address it**

Summarize by reviewing each example and stating the correct procedure to follow. Leave this flip chart posted so that additional information can be added to this sheet as the workshop continues.

2. **Enhance the local events calendar –** 10 minutes

   Ask participants what experience they have in using an events calendar. After several comments, explain the purpose of a local events calendar. Explain that the events calendar will be used to determine the age of children under two who lack documentation of their birth, such as a growth card, immunization card, or birth certificate.

   Post the flip chart. Refer participants to ***TR 2-16: Draft Events Calendar.***

   2-16

Events Calendar—Children

   Read the list of dates on the events calendar and ask the Interviewers if they can think of any other local events to add or other adjustments that need to be made. Add the new events to the flip chart and inform participants that a final version of the events calendar will be typed up after the field test and given to them for the KPC survey.

3. **Practice using the events calendar** – 25 minutes

   Using ***TR 2-16: Events Calendar,*** *demonstrate its use with a hypothetical date for a child under two years of age. Explain:*

Using the Events Calendar

- Always carry a copy of the events calendar to all interviews.
- Events at the top of the calendar are more recent, so if the child is born AFTER a certain event, work your way UP the calendar.
- If the child is born BEFORE a certain event, work your way DOWN the calendar.

Ask everyone to find a partner. Give two or three of the slips of paper with different dates to each participant. Ask the partners to take turns trying to determine the approximate ages using the events calendar.

First, one partner plays the respondent and uses the date on the first slip of paper to answer questions from the Interviewer. When an age is determined using the events calendar, both partners check to see if the answer determined by the Interviewer matches the one on the slip of paper. Partners then switch roles. The new respondent uses one of his or her slips of paper and *the process is repeated. Partners keep switching roles and practicing until they use all of the practice dates provided.*

Ask for questions concerning the use of the events calendar. Emphasize that each Interviewer should carry the events calendar to all interviews.

Learning Session 8: Step 1 Exercise

Instructions for Preparing Documentation

1. Review **TR 2-15: Documentation Required for the KPC Survey Questionnaire** and modify it according to the questions on the **KPC Survey Questionnaire.**

2. Obtain samples of health cards, birth certificates or other documentation that a typical respondent may produce.

3. Make photocopies of the documents to be used as examples during the learning session.

4. Decide what Interviewers should do if documentation is incorrect or if it is not available.

For each type of documentation, use the photocopies to make several different examples to show common errors. Depending on the size of your group, develop several examples for each type of document. Some examples (with possible solutions) to use may include:

- A card has checked boxes for first and second doses of vitamin A, but no dates. *[Solution: ask the mother to verify dates when vitamin A was given.]*
- An Immunization Card has DPT1 left blank (no date, no check mark); but DPT 2 and DPT3 have complete dates. *[Solution: Write "no data" under DPT1 (to show that the Interviewer did not just forget to check that entry but that it was blank on the card) and copy the dates provided on the card for DPT2 and DPT3.]*
- A card that has Measles left blank, but the mother states that the child had a measles vaccine. *[Solution: only accept immunization status if verified by the card.]*
- A card with BCG left blank, but child has a BCG scar. *[Solution: only accept immunization status if verified by card.]*
- A maternal card marked for a woman who delivered a baby on 4/5/04 (d/m/yy) and had prenatal visits on 1/28/03, 2/4/04, 3/6/04. *[Solution: ask the mother to verify dates of her prenatal visits.]*
- A card that states that the child is two months old; however, the vaccination card shows that the child has received Polio1, Polio2 and Polio3. *[Solution: Make sure that the card is for that child. Ask what date in the previous two months the child received a vaccination.]*

Possible Situation to be Discussed with Core Team Before Presenting to Interviewers

The DPT1 and DPT3 boxes are checked with dates, but the DPT2 box has no date.

If you know that vaccination campaigns are carried out periodically, and you know that most of the immunization cards in that community have "March 15" recorded as the date of immunization, you may ask the respondent if there was an immunization campaign in the village on that day and whether or not the child was immunized with everyone else. If the respondent says "yes" then you can assign "March 15" as the immunization date.

9. Giving Feedback Using the Quality Improvement Checklist

Purpose:
To practice conducting interviews using the KPC Survey Questionnaire and Quality Improvement Checklist to provide feedback to Interviewers.

Objectives:
By the end of this learning session, participants will have:
1. Identified the issue that will be addressed by each point in the Quality Improvement Checklist.
2. Reviewed the rules for providing feedback.
3. Recognized common errors in interviewing.
4. Practiced interviewing using the KPC Survey Questionnaire and Quality Improvement Checklist.

Preparation/Materials:
Step 1:
- **TR 2-17: Quality Improvement Checklist**

Step 2:
- Prepare a flip chart with title: Potential Problems During Interviews
- **TR 2-18: Checking for Errors in the Field**
- **TR 2-19: Daily Interview Form**

Step 3:
- **TR 2-20: Giving Feedback**
- Prepare a flip chart with title: Receiving Feedback

Step 4:
- **TR 2-21: Instructions for the Triad Activity**
- Prepare one copy of **TR 2-7: KPC Survey Questionnaire** (from Learning Session 4)for each participant
- Make one copy of **TR 2-17: Quality Improvement Checklist** (from Step 1, above) for each participant
- Prepare several sets of signs to designate roles—a "set" is three signs: Interviewer, Respondent, and Supervisor. To determine the number of sets needed, divide the total number of participants by three.

- Extra Reading: KPC 2000+ Field Guide, pp. 85–89

Time:
120 minutes (2 hours)

Steps:
1. Review and discuss the Quality Improvement Checklist – 10 minutes
2. List common errors that Supervisors need to check – 10 minutes
3. Discussion about giving and receiving feedback – 10 minutes
4. Practice in triads as Interviewer, Respondent and Supervisor – 90 minutes

Steps

1. Review and discuss the Quality Improvement Checklist – 10 minutes

Say:

In the KPC survey, it is extremely important that all of the Interviewers ask the questions exactly the same way. For this reason, each Interview Team is led by a Supervisor who checks that Interviewers all follow the same guidelines and rules. The Supervisor must review every questionnaire while the Interview Team is still in the community so that mistakes can be corrected immediately. In addition, a **Quality Improvement Checklist** is provided as a daily tool to help Supervisors catch errors in interviewing or recording techniques.

Without proper and immediate feedback, the quality of the KPC survey suffers because an Interviewer can make the same mistake over and over again while conducting the KPC Survey. Waiting until after the KPC survey is completed to implement quality control measures leaves many problems until it is too late to correct them.

2-17

*Refer to **TR 2-17: Quality Improvement Checklist.** Ask a volunteer to read the instructions on **TR 2-17.** Ask:*

- **What questions do you have about the instructions on the Quality Improvement Checklist?**

*Address any questions and stress the need for Supervisors to use the **Quality Improvement Checklist** to observe/evaluate at least one interview per day for each Interviewer on the Interview Team. Remind Supervisors not to talk to the Interviewers during the observation. Stress that the purpose of the **Quality Improvement Checklist** is to improve performance and document the quality of the interviews. Let participants know that ways to give effective feedback will be covered in this learning session.*

2. **List common errors that Supervisors need to check** – 10 minutes

*After clarifying the instructions, ask for volunteers to read the questions in the **Quality Improvement Checklist.** Pause occasionally to describe proper and improper interview techniques and to clarify what is meant by the questions.*

Ask:

- **Can you identify the interview "problem" the Supervisor is trying to correct for each point on the checklist?**

Write their ideas on the flip chart.

Potential Problems During Interviews

Ask:

- **What other types of problems should the Interviewer/Supervisor team look for as they are reviewing the completed KPC Survey Questionnaires?**

*After a full discussion, refer to **TR 2-18: Checking for Errors in the Field.** Compare **TR 2-18** with the flip chart list generated during the discussion. Ask participants to update **TR 2-18** with any problems identified by the group during the discussion.*

2-18

Say:

There are a number of levels of quality control during a KPC survey. The computer/data entry people are trained to clean the data, but many mistakes cannot be corrected once they reach the data entry people—questions that were incorrectly skipped or answers that were coded improperly or written illegibly or incorrectly can only be adjusted by the Interviewer who may, in some cases, need to go back to the respondent to ask for clarifications or additional information.

Important

The Interviewers and Supervisors play the most important role in assuring data quality. All **KPC Survey Questionnaires** should be checked immediately after completion while it is still possible to send an Interviewer/Supervisor back to find the particular respondent and clarify the information.

Say:

An additional tool for guaranteeing a good quality survey is through good communication between the Supervisors and the Core Team. Each Supervisor will be asked to complete a **Daily Interview Form** every day during the actual survey.

*Refer participants to **TR 2-19: Daily Interview Form.** Review the form together and ask which parts of the form will be most difficult to complete. Discuss why it is important for Supervisors to be honest about any problems encountered. Answer any questions or concerns.*

2-19

3. **Discussion about giving and receiving feedback** – 10 minutes

   - **How do you like to receive feedback about your performance?**

Write brief responses on the flip chart.

Receiving Feedback

Guide the discussion so that the following issues are included:

- ✓ feedback should be provided in private
- ✓ it should be supportive
- ✓ it should be specific, with examples
- ✓ the positive should be mentioned along with "what needs improvement"
- ✓ reasons should be given for why the improvement is important to the survey
- ✓ there should be a discussion about how the improvements can be made

*Refer to **TR 2-20: Giving Feedback.** Ask participants to take turns reading **TR 2-20** and ask if they have any other comments relating to the feedback process.*

2-20

4. Practice in triads as Interviewer, Respondent and Supervisor – 90 minutes

*Distribute one (1) copy of the **KPC Survey Questionnaire** and one (1) copy of the **Quality Improvement Checklist** to each participant.*

*Divide the participants into triads (groups of three members each). Give one set of signs (Interviewer, Respondent and Supervisor) to each triad. Explain that participants now have an opportunity to practice using the **KPC Survey Questionnaire** and the **Quality Improvement Checklist.** Each member of the triad should take one sign.*

*Each person in the triad should play a different role, depending on what sign the person is holding. The person who is the Supervisor should use the **Quality Improvement Checklist** during the interview and then provide feedback to the Interviewer at the end of the interview. The signs should be passed on at the end of each round, before the next practice interview begins.*

*Ask the participants to complete three rounds so that each participant has an opportunity to play each of the three roles. Refer participants to **TR 2-21: Instructions for the Triad Activity.** Ask for volunteers to read each section. Answer questions that arise.*

2-21

If the number of participants is not divisible by three, have other Core Team members work in the triads to form teams of three.

*When the triads finish the exercise, mention that you will continue working together on using the **KPC Survey Questionnaire** and the **Quality Improvement Checklist** so that everyone can conduct a KPC survey of the highest quality.*

10. Measuring Weight

Purpose:
To learn how measurements of height, weight and age are used as indices to measure malnutrition; also, to define procedures for weighing children and to practice taking weights.

Objectives:
By the end of this learning session, participants will have:
1. Reviewed nutritional indices that will be used to measure malnutrition in the KPC survey.
2. Developed a protocol to use when weighing children.
3. Practiced taking weights.

Preparation/Materials:
Step 2:
- Obtain anthropometry measurement tools (scales, weighing pants, baby slings, two dolls—one about the size of an infant, the other about the size of a two-year-old child. If dolls are not available, use sacks of flour, etc.)
- Prepare a flip chart with title: Equipment/Personnel Needs

Step 3:
- **TR 2-22: Taking a Child's Weight**
- **TR 2-23: Protocol for Taking Weights**

Time:
3 hours

Steps:
1. Present a brief explanation of nutritional indices – 5 minutes
2. Discuss equipment and personnel needed to conduct anthropometric measurements – 5 minutes
3. Develop a protocol to be used when weighing children – 20 minutes
4. Observe and practice correct procedures for taking anthropometric measurements – 2.5 hours

Steps

1. Present a brief explanation of nutritional indices – 5 minutes

Ask:

- **What are some measurements that can tell us about malnutrition?** *[weight, height, age, arm circumference]*

Say:

Let us say that a child weighs 27 pounds.

- **How do we know if the child is well nourished or poorly nourished from this measurement?** *[We know by comparing that measurement to the measurement of other children the same age who have grown well.]*

There are a number of ways that we can compare children, or adults, to see if they are growing adequately. These measurements are called "indices" and the ones we are going to look at (depending on previous decisions made by the Core Team) are weight-for-age, height-for-age, weight-for-height, and MUAC (Middle Upper Arm Circumference).

Use the following to describe for the group each measurement you plan to use.

Nutritional Indices

- **Weight-for-age:** This is the most commonly used measurement in Child Survival projects. When a child has a low weight-for-age it is called "global malnutrition." Weight-for-age shows the combined effects of lack of food or decreased food absorption from illness both in the recent past and in the current situation of the child. Weight-for-age usually shows the highest percentage of malnutrition when evaluating nutritional status in a country.

- **Height-for-age:** Poor height-for-age indicates chronic malnutrition from receiving too little food over a long period of time or from a long-term illness that affects the absorption of nutrients. The child will grow, but will be shorter or stunted. Correct height measurements (using reliable equipment and good training) can be rather expensive in terms of both materials and personnel. Height-for-age is not very often included in KPC surveys because it is both expensive and difficult to measure accurately without a great deal of training.

- **Weight-for-height:** This is a measure of acute malnutrition in children who have generally been growing well but then have a health problem that causes their weight to falter in relationship to their height. Weight-for-height measurements usually identify the smallest percentage of deficiencies compared to the other two indices, and they indicate serious problems—often drought, famine or epidemics. Measuring weight-for-height is usually much too time-consuming to include in a KPC survey. However, one benefit of weight-for-height is that you do not need to know the child's age in order to calculate it.

- **MUAC** (Middle-Upper Arm Circumference) is taken only on children 1 through 5 years of age and adults. MUAC can be a better indicator of mortality risk than weight-for-height or weight-for-age, but only if measured accurately. MUAC is collected in some child and maternal health surveys because it is very easy to use and cost-effective.

Inform participants about which measurements will be taken during the KPC survey, including decisions made by the Core Team as to whether Special Teams will be used or if all Interviewers will take anthropometric measurements and whether there will be mobile measurement teams (moving from house to house) or stationary measurement teams (remaining in a specific location, e.g., a school).

If height or MUAC are going to be measured, insert optional Learning Sessions 14 or 15, which should be scheduled for completion before implementing the ***Standardization Test*** *in Leaning Session 11. The* ***Standardization Test*** *should include standardization of* <u>*all*</u> *measurements being taken for the survey.*

2. **Discuss equipment and personnel needed to conduct anthropometric measurements** – 5 minutes

Post the flip chart. Include only those measurements that are going to actually be taken during the KPC survey. For each measurement to be taken, ask:

> ➢ **What equipment do we need to take this measurement?**

Equipment/Personnel Needs

Note the group's ideas on the flip chart and add from the following list if necessary. Add personnel needs.

Equipment and Personnel Needed for Anthropometry Measurements

- **Weight-for-age:** Hanging scales marked in 100 gram increments, two pair of weighing pants and two baby-weighing slings for each Interview Team, recording forms, cleaning materials for cleaning pants, and events calendar for calculating child's age in months. One person can take the weight of a child. (The mother often helps by holding the child.) *(Show the equipment you obtained for the exercise.)*
- **Height-for-age:** Length board for children under 24 months of age and height board with a metal (non-stretchable) tape for children 24 months of age and older, towel (for cleaning the height board when necessary), recording form, and events calendar. Two or three people are needed to measure one child accurately.
- **Weight-for-height:** All of the equipment mentioned above for both weight and height are needed for the weight-for-height measurement. Two or three people are needed to measure one child accurately.
- **MUAC:** MUAC tape. One person can easily take the MUAC measurement.

3. **Develop a protocol to be used when weighing children** – 20 minutes

Ask:

> ➢ **Who would like to share your experience weighing children for a survey or health office?**

After one or two participants share their experiences, say:

> Today we are going to write a protocol for how to weigh children for the KPC survey. This protocol will tell us step-by-step how to take the weight measurement for this survey.

*Refer to **TR 2-22: Taking a Child's Weight.** Participants need to refer to it during the discussion.*

2-22

2-23

*Refer participants to **TR 2-23: Protocol for Taking Weights.** Ask participants to read **TR 2-23.** When they finish, ask them what questions they have.*

*In order to complete the Steps for Weighing on page 2 of **TR 2-23,** ask the group to tell the Trainer exactly what to do to weigh the child (while the Trainer demonstrates with the dolls or a sack of flour, etc.). The Trainer should follow the steps given exactly, adding nothing more. Write each step on a flip chart. If steps are omitted, guide the group until they mention all of the important tasks. It may be necessary to change the order or add some steps on the flip chart. Re-write the steps on a clean flip chart so all steps are included in the proper order. Instruct participants to write down the steps on **TR 2-23.***

TR 2-23 Protocol for Taking Weights

1. **How many people should measure?**
   [One person can weigh a child, but it is best to have the mother help and have a second person to record the weights.]

2. **At what point during the KPC survey should you weigh and measure?**
   [Do not weigh at the very beginning of the interview—it is better to weigh at the very end of the interview.]

3. **What should the mother/caretaker do during the weighing?**
   [Involve the mother/caretaker. Ask the mother/caretaker to talk to the child and look into the child's eyes.]

4. **What should you be doing with the child you are weighing?**
   [Control the child—always maintain contact with the child; move slowly around the child. Complete all of the measurements on one child before proceeding to the next child.]

5. **What should you tell the mother/caretaker?**
   [Explain the procedures as you weigh.]

6. **What other things should you be careful about when working with children?**
   [Be careful with sharp objects when measuring children (e.g., pencils in pockets, nails, jewelry, etc., watch for dangerous situations). Also, try to keep the children calm, reassuring them that they process will not hurt and even trying to make it "fun."]

Steps for Weighing:

1. **What should you do first?**
   [Get all required equipment for weighing ready, locate children to be weighed, explain to the mother/caretaker what you are going to do and what the mother/caretaker needs to do.]

2. **What should you do next?**
   [Observe what the child is wearing and, where possible, reduce the amount of clothing before weighing. Ask the mother to help you place the child in the pants or sling, gently place the child on the scale, supporting the child for a few seconds before releasing the child and reading the weight.]

3. **How should you read the scale?**
   - *[Read the scale at eye level*
   - *Count the visible lines*
   - *If on the line, count that line*
   - *If between the lines, record the nearest number*
   - *Be careful about rounding to 0.5 and 0.0*
   - *Call out the weight or say it out loud while the child is still on the scale]*

4. **How should you record the weight?**
   [To document the weight, the person weighing calls the number out loud and repeats it until it is recorded. The recorder repeats the weight while writing it down.]

5. **What is the best way to train people to take weight measurements?**
   *[With a **Standardization Test** which is a way to check the accuracy of weights by having different people weigh the same child to determine if some people are making errors that require more training. And **Practice, Practice, Practice.**]*

4. **Observe and practice correct procedures for taking anthropometry measurements –** 2.5 hours

   Tell participants they now have a sound protocol for taking weight measurements that they can use when practicing taking weights. Ask for a volunteer to weigh a doll using the weighing pants, with one person in the group reading the protocol. Ask participants to observe the steps and give feedback on any additional changes in the protocol. Ask another volunteer to weigh another doll, using the weighing sling and, again, ask the participants to provide feedback.

   Divide the participants into small groups (the number of groups will depend on how many scales you have). Each group will use the protocol to practice weighing. Have them weigh books, purses, etc. or anything else that will fit in the sling or pants. Move around among the groups to make sure proper procedure is being followed.

   If it is possible to practice with actual children, that is ideal. Another option is to prepare bags of flour, sand, etc. of known weights and have all of the participants take turns weighing them and recording the weights. Check each person's record and provide additional training, if necessary.

11. Conducting Standardization Testing

Purpose:
To standardize the measurements taken during the KPC survey.

Objectives:
By the end of this learning session, participants will have:
1. Completed a Standardization Test to ensure consistent measurement by individual members of the Interview Teams.

Preparation/Materials:
Step 1:
- Additional anthropometry measurement tools (height board, length board, MUAC tapes, scales, weighing pants, baby slings), depending on the indices to be used for the survey
- Arrange for a group of children to be present so that measurements can be practiced and a Standardization Test can be completed
- Read the Instruction for Standardization Testing and Sample Summary Data Sheet at the end of this learning session
- **TR 2-24: Standardization Test Form**
- Copy of the **Summary Data Sheet for Standardization Tests** (see the last page of this learning session)

Time:
3 to 4 hours (depending on how many different measurements are taken)

Steps:
1. Conduct a Standardized Test – 3 hours (weight only) (4 hours for multiple measurements)

Steps

1. Conduct a Standardized Test – 3 hours (weight only) (4 hours for multiple measurements)

We are now going to use a **Standardization Test** to practice taking the measurements that will be taken during the KPC survey.

Explain the activity as follows:

A **Standardization Test** provides the Interviewers with an opportunity to practice their measurement skills on a group of children. The measurements for each child are compared to determine the accuracy of measurements taken by the various members of the Measurement Teams. Accuracy is defined as when an individual obtains the same weights/measurements as his/her peers for the same child.

2-24

Two forms are used in **Standardization Test.** The ***TR 2-24: Standardization Test Form*** is used by each member of the Measurement Team to record the weights/measurements of ten children. These weights/measurements are then transferred to the **Summary Data Sheet for Standardization Tests** *(on the last page of this learning session).* By placing all of the results on one summary sheet, it is possible to review the weights/measurements for any obvious errors or trends.

You will work in Measurement Teams of two people: one Interviewer and an assistant (Supervisor or Core Team) or two Interviewers, but only one member of the team takes the test measurements and records the results, <u>without comment</u> from the partner. After one partner has completely weighed/measured and recorded the results of all of the children in the test, the other person weighs/measures the children and records the results, <u>without comment</u> from the partner. The partner serves only as an assistant (e.g., helping child into and out of the weighing pants, or helping to lift the child to the scale). Make a note directly on ***TR 2-24*** if the child's behavior was difficult enough to influence the accuracy of the measurements.

When you have finished with the weighing, bring your recorded weights to the Trainer to be recorded on the **Summary Data Sheet for Standardization Tests.**

*Instruct participants about how to complete the **TR 2-24: Standardization Test Form.** Ask:*

- **What questions do you have about the measurement exercise or how to complete the form?**

Respond to questions and clarify information.

Begin the weighing/measuring exercise. Circulate among the Measurement Teams to observe and answer questions. Remember to take notes on any unruly children and the effect their behavior may have on the accuracy of the measurements.

*Ask participants to identify problems they had during the **Standardization Test.** (Optional: Analyze the **Standardization Test** results together. If you decide to conduct a group analysis, the names of the participants can be substituted with a confidential code number.)*

Ensure that you respond to any questions before closing the learning session and reiterate to the participants the critical need for accurate measurements and the crucial role Interviewers play in taking accurate measurements.

Instructions for Standardization Testing

A **Standardization Test** provides the Interviewers with an opportunity to practice their measurement skills on a group of children. The children can be organized in groups to facilitate the flow of children from one Measurement Team to the next. Two or three Measurement Teams weigh and measure the same group of ten children. (Not every group has to measure all ten children. Be sure every Interviewer weighs at least five children, and that every child gets weighed three (3) or four (4) times. More measurements of the same child become difficult because the children tend to become tired, cranky and bad-tempered with multiple weighings.)

The measurements of each child are compared to determine the accuracy of measurements taken by the various members of the Measurement Teams, including the Trainer. (Accuracy is defined as when an individual obtains the same weights/measurements as his/her peers for the same child.)

This **Standardization Test** helps determine which Interviewers provide the most accurate measurements (often uncorrected vision problems cause great difficulties for some individuals). This information is useful when selecting members for the Interview Teams or when determining which Interviewers will be assigned the task of taking anthropometric measurements. It also demonstrates to the participants the critical need for accurate measurements and the crucial role Interviewers play in taking accurate measurements.

Planning the Standardization Test:

1. Standardization Testing should be implemented at least once during the training workshop, especially if you are measuring the heights of the children as height standardization is very difficult.
2. The Standardization Test takes three to four hours for all three measurements (weight, height/length, MUAC)—it takes less time to measure only weights.
3. Source for children: school, day care, etc., but not sick children at clinics.
4. Use ten children for each group of ten participants who are being tested. If there are many participants to test, more than one group of ten children can be organized and assigned to Interviewers for weighing/measuring (reducing the strain on the children being measured).
5. Test older, more cooperative children, but practice on very young children, too. Ideally, the children should be the same age range as the children who will be measured during the survey.
6. Children can sit together and the individuals taking the weights/measurements can go to pick up the children for measuring. A trainer or supervisor should stay with the children unless there is another volunteer watching over them.
7. Have the necessary equipment available and ready.
8. If using hanging spring dial scales (Salter), each child can wear a pair of weighing pants for the entire test. (Use a separate pair of pants to zero the scale.)
9. Two forms are used in the **Standardization Test.** The ***TR 2-24: Standardization Test Form*** is used by each member of the Measurement Team to record the weights/measurements of ten children. These measurements are then transferred to the **Summary Data Sheet for Standardization Tests.** By placing all of the results on one summary sheet, it is possible to review the weights/measurements for any obvious errors or trends. This is extremely useful as a training tool.

10. Have the participants work in Measurement Teams of two people, but with only one member of the team taking the test measurements and recording the results on ***TR 2-24*,** without comment from the partner. After one partner has completely weighed/measured and recorded the results of all of the children in the test, the other person should weigh/measure the children and record the results, without comment from the partner. The partner should serve only as an assistant (e.g., helping child into weighing pants, helping child down). Ask the participants to make a note directly on ***TR 2-24*** if the child's behavior was unruly or difficult enough to impact the accuracy of the measurements.

11. The Trainers should not make any corrections during the **Standardization Test** but should take notes about common problems or errors to emphasize in retraining, if needed, and any children who were unruly or difficult to weigh or measure.

12. Record weights/measurements from the Interview Teams on a blank **Summary Data Sheet for Standardization Tests Form 2** *(on the last page of this learning session).* You can prepare the **Summary Data Sheet for Standardization Tests** as a visual (overhead, flip chart, PowerPoint slide, etc.) so that participants can observe and analyze the results, or you can compile the results more privately to be analyzed by the Core Team.

13. Use the completed **Summary Data Sheet for Standardization Tests** to interpret the results:
    - Look for trends (e.g., consistently higher or lower weights for any one measurer)
    - Look for errors (outliers)
    - Look for rounding (only 10% of measurements should end in 0, and only 10% in 5, but people tend to round off numbers to either 0 or 5)
    - Discuss technique problems observed
    - Decide if retraining is necessary
    - Use the individuals who take the most accurate measurements during the **Standardization Test** to conduct the measurements during the survey

Instructions for Summary Data Sheet for Standardization Tests

(See the example of Form 2, Raw Data of Standardization Test, handwritten, at the end of this learning session)

Entering the results from the Interview Teams on one form helps identify potential errors, e.g.:

1. In the test results of the recumbent length on the form, with the exception of Observer #5, all other measurements and the Trainer measured the child between 95.1 and 98.3 cm (mean = 95.9). Observer #5 measured the child at 85.4 cm. Since this is the only major difference between the Observer and his/her peers, this would probably indicate a recording error. The Observer probably meant to record 95.4 instead of 85.4.
2. For Child #10, with the exception of Observer #1, all others measured the child between 102.8 and 103.8 cm. Observer #1 measured the length as only 82.6 cm. This could be a recording or weighing error, in that the observer weighed a different child.
3. In addition, trends can be viewed. For example, Observer #3 seemed to measure the recumbent length consistently higher for all children in comparison to the other observers; the errors were probably due to procedural errors such as not pushing the child's heels strongly against the board, or not making sure that the back of the child's head was against the measuring board.

Adapted from Irwin J. Shorr, MPH, MPS. Use of Form 2: Raw Data of the Standardization Test.

Summary Data Sheet for Standardization Tests

Trial No. ____________ Date ______________________

Circle One: Weight Height Length MUAC

		Measurer's Name or ID Number									
Child No	Trainer	1	2	3	4	5	6	7	8	9	10
1											
2											
3											
4											
5											
6											
7											
8											
9											
10											

FORM 2
RAW DATA OF STANDARDIZATION TEST
HEIGHT/LENGTH/WEIGHT/OTHER__________(CIRCLE ONE)

'ALUATED BY: IRWIN J. SHORR
NAME

DATE: DAY 19 MONTH 08 YEAR 8[illegible]
MONTEGO BAY, JAMAICA

Trainer/ Supervisor Name: SHORR		OBSERVER									
		1 Name: FOX		2 Name: BENDLEY		3 Name: MAUREEN		4 Name: MILLICENT		5 Name: LEE	
SUBJECT NUMBER	a	b	a	b	a	b	a	b	a	b	a	b

SUBJECT NUMBER	Trainer/Supervisor a	Trainer/Supervisor b	1 a	1 b	2 a	2 b	3 a	3 b	4 a	4 b	5 a	5 b
1	85.1	84.8	85.1	85.6	84.5	85.0	86.7	86.0	85.4	84.6	84.9	85.2
2	71.7	72.8	71.8	72.5	71.1	71.2	74.3	73.6	72.9	72.1	71.9	72.7
3	104.2	103.9	104.1	103.9	103.3	104.3	104.5	104.6	103.7	103.4	104.0	104.3
4	87.2	87.1	87.6	86.5	87.1	86.7	87.2	88.3	87.6	87.4	86.6	87.5
5	88.6	88.6	88.3	88.5	88.1	88.5	89.6	89.8	89.1	88.9	88.4	88.5
6	95.9	95.8	95.8	95.6	95.2	95.1	96.9	96.9	96.1	96.3	85.0	95.6
7	110.5	111.2	110.9	110.5	110.4	110.6	112.6	111.7	111.1	110.9	110.4	111.6
8	81.4	80.5	80.9	80.8	80.8	80.5	83.1	81.8	81.0	81.3	80.6	81.4
	88.6	89.2	88.1	88.4	88.3	88.1	89.8	89.3	89.0	88.8	88.9	89.[illegible]
10	103.3	103.6	82.6	103.3	102.5	102.8	103.5	103.6	103.4	103.0	103.1	103.0

12. Practicing Interviews

Purpose:
To provide an additional opportunity for participants to practice using the KPC Survey Questionnaire and the Quality Improvement Checklist.

Objectives:
By the end of this learning session, participants will have:
1. Practiced conducting the KPC survey interview in triads.
2. Completed a Quality Improvement Checklist.
3. Given feedback to the Interviewer.
4. Analyzed the interviewing process.

Preparation/Materials:
Step 1:
- Prepare signs to designate roles: Interviewer, Respondent, Supervisor (from Learning Session 9)
- One copy of **TR 2-7: KPC Survey Questionnaire** (from Learning Session 4) for each participant
- One copy of **TR 2-17: Quality Improvement Checklist** (from Learning Session 9) for each participant
- **TR 2-21: Instructions for the Triad Activity** (from Learning Session 9) (for reference only)
- **TR 2-20: Giving Feedback** (from Learning Session 9) (for reference only)

Step 3:
- Organize a group of "interviewees" in a nearby community similar to those included in your program to be interviewed the following day during the field test
- Finalize all logistical arrangements for the field test and be prepared to share those arrangements with participants

Note: Depending on the level of experience of the Interviewers, it may be advisable to practice conducting the interview one additional time after this learning session. The Interviewers will have the opportunity to practice during the field test in a community with respondents of similar characteristics as the target population for the KPC survey.

Time:
120 minutes

Steps:
1. Practice in triads as Interviewer, Respondent and Supervisor – 90 minutes
2. Discuss questionnaire and interviewing issues identified during practice interviews – 25 minutes
3. Introduce the field test – 5 minutes

Steps

1. Practice in triads as Interviewer, Respondent and Supervisor – 90 minutes

*Divide the participants into triads (groups of three members each). Give one set of signs (Interviewer, Respondent and Supervisor) to each triad. Explain that participants now have an opportunity to practice using the **KPC Survey Questionnaire** and the **Quality Improvement Checklist.** Each member of the triad should take one sign. Each person in the triad should play a different role, depending on what sign he or she is holding. The person who is the Supervisor* *should use the **Quality Improvement Checklist** during the interview and then provide feedback to the Interviewer at the end of the interview. The signs should be passed on at the end of each round, before the next practice interview begins. Ask the participants to complete three rounds so that each participant has an opportunity to play each of the three roles.*

If the number of participants is not divisible by three, have other Core Team members work in the triads to form teams of three.

2-7 2-18 2-20 2-21

*Distribute one copy of **TR 2-7: KPC Survey Questionnaire** and one copy of **TR 2-18: Quality Improvement Checklist** to each participant. Encourage participants to refresh their memories by reviewing **TR 2-21: Instructions for the Triad Activity** and **TR 2-20: Giving Feedback.** Answer any questions.*

Begin the rounds. During the exercise, circulate among the triads to monitor the interview sessions and to audit a sample of the completed questionnaires. Offer advice, correction and encouragement to the triad members. Monitor the feedback sessions.

At the end of the three rounds—after everyone has had the chance to be the Interviewer, Respondent, and Supervisor—bring the participants back to the large group.

2. **Discuss questionnaire and interviewing issues identified during practice interviews –** 25 minutes

*Now that participants have had a chance to work again with the **KPC Survey Questionnaire,** ask:*

- **What questions, problems or concerns do you have with anything on page 1 of the KPC Survey Questionnaire? Are there any changes that need to be made to the questionnaire?**

Clarify and respond to questions and comments and then move on to page 2. Ask the same questions for each page of the questionnaire. Then ask:

- **What questions, problems or concerns do you have with the interviewing process?**

When all of the questions, problems and concerns have been discussed, explain that the questionnaire will be revised and retyped to be used for the field test tomorrow.

3. **Introduce the field test –** 5 minutes

Tomorrow we will go to the community of ___________________ to complete a field test of the instruments we reviewed (and revised) today. The field test will further familiarize you with the **KPC Survey Questionnaire,** and provide an opportunity to refine the questionnaire and the **events calendar** before they are duplicated and distributed to the Interviewers.

Review any logistical details pertaining to the field test.

13. Field Test and Revise the KPC Survey Instruments

Purpose:
To field test the KPC Survey Questionnaire and other survey instruments, to practice giving and receiving feedback and to finalize the survey instruments.

Objectives:
By the end of this learning session, participants will have:
1. Conducted interviews and anthropometric measurements in the field using the KPC Survey Questionnaire and the Quality Improvement Checklist.
2. Reviewed with respondents the validity of the events calendar and lexicon.
3. Made changes in the materials to be used in the KPC survey and developed the final draft of the KPC Survey Questionnaire.

Preparation/Materials:
- Confirm the preparations made regarding location and logistics for a field test

Step 1:
- Make 2 copies of **TR 2-17: Quality Improvement Checklist** for each participant
- Make 4 copies of **TR 2-7: KPC Survey Questionnaire** for each participant
- Assemble equipment (scales, hanging pants and slings, length boards, etc.) for measuring weight, height and/or MUAC—depending on the objectives of the project
- Assemble clipboards, pens, water, other supplies for completing the field work

Step 2:
- 1 copy of the Lexicon for each participant
- 1 copy of the Events Calendar for each participant
- **TR 2-25: Workshop Evaluation**
- Certificates (optional)

Time:
6 hours

Steps:
1. Field test the KPC Survey Questionnaire using the Quality Improvement Checklist – 4 hours
2. Modifying the KPC Survey Questionnaire, events calendar(s) and lexicon – 2 hours

Steps

1. Field test the KPC Survey Questionnaire using the Quality Improvement Checklist – 4 hours

Distribute two (2) copies of ***TR 2-17: Quality Improvement Checklist*** *and* ***TR 2-7: KPC Survey Questionnaire*** *to each participant. Explain:*

The goals of the field test are to:

- practice household selection using the decision chart developed by the Core Team
- provide an opportunity for the Supervisors and Interviewers to practice using the **KPC Survey Questionnaire** and the **Quality Improvement Checklist**
- check the **KPC Survey Questionnaire** for phrasing, difficult-to-translate words, respondents' comprehension of the questions, and the types of answers that the questions evoke

- review the assumptions used in developing the lexicon
- determine if documentation is available (vaccination cards, maternal cards, etc.)
- review the events calendar to determine if the dates chosen are well known or if respondents can suggest other events to include
- provide an opportunity to test equipment and procedures for any anthropometric measurements that are included in the KPC survey

*The Supervisors and Interviewers are encouraged to write on the **KPC Survey Questionnaire** itself any concerns, questions, or other thoughts that arise during the field test. They should bring the completed questionnaires, and all of the other instruments when the group gathers together again in Step 2, below.*

*It is recommended that various individuals play the role of Supervisor so that everyone has an opportunity to give and receive feedback using the **Quality Improvement Checklist.** Supervisors also need to practice using the **KPC Survey Questionnaire.** It is suggested that the Supervisors interview one (1) or two (2) women and receive feedback from another Supervisor, a Core Team member or an Interviewer. Interviewers should interview three (3) or four (4) women and observe one (1) or two (2) interviews (conducted by other Interviewers) using the **Quality Improvement Checklist.***

*Send participants into the community to conduct the field test. During the interviews, members of the Core Team could simultaneously meet with community members and review the **events calendar** and the **lexicon.***

2. **Modifying the KPC Survey Questionnaire, events calendar and lexicon** – 2 hours

After the field test, ask the group to sit together again to discuss:

- Unclear questions
- Awkward questions
- Terms that are difficult or impossible to translate
- Results that differ from what was expected
- Better phrasing for the questions
- Frequent use of the "other" category
- Problems with anthropometric measurements
- Experience with household and respondent selection and questions about to do it properly

*During this discussion, a member of the Core Team should take notes on the required changes in the **KPC Survey Questionnaire,** the **lexicon,** and the **events calendar** and finalize the instruments after the learning session is complete.*

*When all of the questions, problems and concerns have been discussed, explain that the **KPC Survey Questionnaire** will be retyped in its final form and be ready for the survey. Review any logistical details about the survey.*

2-25

Thank the participants for their hard work and close the workshop by having participants complete **TR 2-25: Workshop Evaluation.** Present Certificates of Completion (optional, not provided).

Optional Learning Sessions

14. Measuring Length/Height

15. Measuring MUAC

14. Measuring Length/Height

Purpose:
To ensure accurate length/height measurements by Interviewers during the KPC survey.

Objectives:
By the end of this session, participants will have:
1. Identified key factors in taking accurate height measurements.
2. Developed protocol for taking height measurements.
3. Practiced taking height measurements.

Preparation/Materials:
Step 1:
- **TR 2-26: Diagrams for Length/Height Measurements**
- **TR 2-27: Protocol for Length/Height Measurements**

Step 2:
- Height board, length board, recording form
- If possible obtain dolls or other objects of various lengths/heights to use in practice

Step 3:
- If possible, arrange for a group of children to be present for practicing measurements

Time:
120 minutes (plus participation in the 3-hour Standardization Test in Session 11)

Steps:
1. Identify the key factors in measuring length/height and develop a protocol – 20 minutes
2. Practice taking accurate length/height measurements – 100 minutes

Steps

(Note: Children under 24 months should be measured lying down; if only this age group is included, you do not need to include practice in measuring standing height, only length.)

1. **Identify the key factors in measuring length/height and develop a protocol** – 20 minutes

   Ask the group:

   - **If any of you have previously taken length/height measurements, what are the most important things to remember?**

   *Refer to **TR 2-26: Diagrams for Length/Height Measurements.** Say:*

   2-26

   This diagram will serve as a reminder of the proper protocol. Let us think about all of the steps necessary for taking accurate length/height measurements.

   *Refer participants to **TR 2-27: Protocol for Length/Height Measurements.** Explain that, just as we had a protocol for taking weight measurements, we now need a protocol for taking length/height measurements. The diagrams will guide the process. Ask participants to read **TR 2-27.** When people finish, ask what questions they have.*

   2-27

*In order to complete the Steps for Length/Height Measurements on **TR 2-27,** ask the group to tell the Trainer exactly what to do to measure the child (while the Trainer demonstrates with the dolls or a sack of flour, etc.). The Trainer should follow the steps given exactly, adding nothing more. Write each step on a flip chart. If steps are omitted, guide the group until they mention all of the important tasks. It may be necessary to change the order or add some steps on the flip chart. Re-write the steps on a clean flip chart so that all of the steps are included in the proper order. Instruct participants to write down the steps on **TR 2-27.***

Tell participants they now have a sound protocol for taking length/height measurements.

TR 2-27 Protocol for Length/Height Measurements

1. **How many people should measure length/height?**
   [Two people are required to measure length/height.]

2. **At what point during the KPC survey should you measure length/height?**
   [Do not measure at the beginning of the interview—it is better to measure at the very end of the interview.]

3. **What should the mother/caretaker be asked to do during the measurements?**
   [Involve the mother/caretaker in the process. Ask the mother/caretaker to speak with the child, help hold the child and look the child directly in the eye.]

4. **What should you do with the child you are measuring?**
   [Control the child—always maintain contact with the child; move slowly around the child. Complete all of the measurements on one child before proceeding to the next child.]

5. **What should you tell the mother/caretaker?**
   [Explain procedures as you measure. Ask the mother/caretaker to look right at the child, making eye contact during the measurements.]

6. **What other things should you be careful about when working with children?**
   [Be careful with sharp objects when measuring children (e.g., pencils in pockets, nails, jewelry, etc.). Also, try to keep the children calm, reassuring them that the process will not hurt and even trying to make it "fun."]

Steps for Length/Height Measurements:

1. **What should you do first**?
   [Identify teams (working in pairs) to take measurements, locate children to be measured, locate equipment for measuring, and decide where and how to record measurements on the questionnaire.]

2. **What should you do next?**
   [*Determine the age of the child. Children less than 24 months must be measured in a reclining position. Children older than 24 months must be measured standing.]*

3. **When measuring the height of a child, what parts of the body are placed against the height board*?***
   - *[Feet should be together with back of heels on back of board and soles of feet on the base of the board*
   - *Knees should be pressed against the board and legs straight*
   - *Support child's chin with hand, allowing fingers to spread to side (do not cover mouth or ears, or lay arm on chest)*
   - *Head and shoulders should be straight, level and touching the back of the board*
   - *Top of the head should be touching the headpiece]*

4. **How should the head be positioned?**
   [An imaginary line should be drawn from the bottom of the eye socket straight back through the ears. This line is at a 90 degree angle from the back of the board. This position is extremely important for an accurate reading.]

5. **How should you read the board?**
   - *[One measurer should read the scale at eye level*
   - *Count visible lines*
   - *If on the line, count that line*
   - *If between lines, record nearest number*
   - *Be careful about rounding to 0.5 and 0.0*
   - *Call out the measurement or say it out loud while the child is still on the board]*

6. **How should you record length/height?**
   [To document length/height, the measurer should *call the number out or repeats it until it is recorded. The recorder should repeat the measurement while writing it down.]*

7. **What is the best way to train people to take height?**
   *[A **Standardization Test** is a way to check for accuracy by having different people measure the same child to determine if there are more errors with some people's measurements than with others. And **Practice, Practice, Practice**.]*

*(Note: If MUAC is also being measured, include and complete Optional Session 15 before the **Standardization Test.** The **Standardization Test** should include standardization of all measurements being taken for the survey. Adapt the data collection forms to the data being collected—i.e. weight, height and MUAC.)*

1. **Practice taking accurate length/height measurements** – 100 minutes

   Demonstrate again the proper technique for measuring length/height using the protocol. If necessary, have the group revise the written protocol.

   Make available the needed equipment. Divide the participants into small groups (the number of groups depends on how many boards you have). Tell participants they now will practice taking lengths/heights and give each team a doll or other item to measure. Each group should use their protocols to practice. Two participants should take the measurements while one participant acts as the observer, reading the protocol. Ask the teams to switch roles until every participant has a chance to practice measuring. Have each group measure a variety of dolls/objects. Move around between the groups to make sure proper procedure is being followed.

   The ideal is to practice with actual children, if possible. Another option is to prepare items of different length or height and have all of the participants take turns measuring them and recording the length/height. Check each person's record and provide additional training if necessary.

15. Measuring MUAC

Purpose:
To ensure accurate MUAC measurements by Interviewers during the KPC survey.

Objectives:
By the end of this learning session, participants will have:
1. Identified key factors in taking accurate MUAC measurements.
2. Developed a protocol for measuring MUAC.
3. Practiced taking MUAC measurements.

Preparation/Materials:
Step 1:
- **TR 2-28: Diagrams for Measuring MUAC**
- **TR 2-29: Protocol for MUAC Measurements**

Step 2:
- Assemble MUAC tapes and recording forms
- Assemble dolls of various sizes, balloons, or just use participants' arms for practice
- Arrange for a group of children to be present for practicing measurements

Time:
60 minutes (plus participation in the 3-hour Standardization Test that occurs in Session 11)

Steps:
1. Identify key factors in measuring MUAC and developing protocol – 20 minutes
2. Practice taking accurate MUAC measurements – 40 minutes

Steps

1. Identify key factors in measuring MUAC and developing protocol – 20 minutes

Present the following explanation about MUAC:

MUAC
(Mid-Upper Arm Circumference)

Measuring a child's MUAC is faster and easier than measuring weight and height. Some world experts in nutrition believe that because it is very difficult to accurately measure weight and height, we should switch to using MUAC, which is another measure of wasting, and which has repeatedly been shown to be a better indicator of mortality risk than weight-for-height or weight-for-age.

Wasting is the anthropometric indicator most highly associated with mortality, and MUAC is the best indicator of mortality risk, so we believe it will be useful to use the MUAC measurement to collect data on wasting during basic health surveys.

Ask the group:

- **If any of you have previously taken MUAC measurements, what are the most important things to remember?**

Say:

> *Look at **TR 2-28: Diagrams for Measuring MUAC**.* These diagrams will serve as reminders of the proper protocol. Let us think about all of the steps necessary for taking accurate MUAC measurements.

2-28

*Refer participants to **TR 2-29: Protocol for MUAC Measurements.** Explain that, just as they had a protocol for taking weight measurements, they will use a protocol for taking MUAC measurements. Ask participants to read **TR 2-29.** When people finish, ask what questions they have.*

2-29

*In order to complete the Steps for MUAC Measurements on page 2 of **TR 2-29,** ask the group to tell the Trainer exactly what to do to measure the child (while the Trainer demonstrates with a volunteer's arm). The Trainer should <u>exactly</u> follow the steps given, adding nothing more. Write each step on a flip chart. If steps are omitted, guide the group until they mention all of the important tasks. It may be necessary to change the order or add some steps on the flip chart. Re-write the steps on a clean flip chart so that all of the steps are included in the proper order. Instruct participants to write down the steps on **TR 2-29.***

Tell participants they now have a sound protocol for taking MUAC measurements.

TR 2-29: Protocol for MUAC Measurements

1. **How many people should measure?**
   [One person is required to measure MUAC.]

2. **At what point during the KPC survey should the Interviewers measure MUAC?**
   [Do not measure at the beginning of the interview—it is better to measure at the very end of the interview.]

3. **What should the mother/caretaker be asked to do during the measurements?**
   [Involve the mother/caretaker. Ask the mother/caretaker to speak with the child and look the child directly in the eye.]

4. **What should you do with the child you are measuring?**
   [Control the child—always maintain contact with the child; move slowly around children. Complete all of the measurements on one child before proceeding to the next child.]

5. **What should the Interviewers tell the mother/caretaker*?***
   [Explain procedures as you measure. Ask the mother/caretaker to look right at the child, making eye contact during the measurements.]

6. **What other things do the Interviewers need to be careful about when working with children?**
   [Be careful with sharp objects when measuring children (e.g., pencils in pockets, nails, jewelry, etc.). Try to keep the children calm, reassuring them that the process will not hurt and even trying to make it "fun."]

Steps for MUAC Measurements:

1. **Who can be measured with MUAC?**
   [The arm circumference of most children between 1 and 5 years of age changes very little. Therefore, children of these ages can be included in a nutrition survey using the same standards. Only measure MUAC on children 12 months of age or older. It is not accurate for infants.]

2. **What do MUAC measurements mean?**
   [When measuring MUAC, use the cut-offs promoted by USAID:

Normal:	*13.5 cm or greater (Green)*
Mild Malnutrition:	*12.5 to 13.4 cm (Yellow)*
Moderate to Severe Malnutrition:	*Less than 12.5 cm (Red)]*

3. **What should you check related to the child's nutritional state before taking a MUAC measurement?**
   [Before taking the measurement, the Interviewer should check the child for bipedal edema, the swelling associated with kwashiorkor. This is accomplished by pressing a finger against the front of the child's foot for about 3 seconds. A dent (pitting) indicates that the child has edema and, therefore, should not be measured. It should be recorded that the child has edema and is severely malnourished. <u>If there is no sign of edema</u>, the Mid-Upper-Arm Circumference of the child can be measured.]

4. **Where should the tape be placed? How tight should it be held?**
   [The tape should be wrapped closely, but not tightly, around the arm, midway between the elbow and the point of the shoulder. The arm should be hanging loosely, with the tape measure circled around the arm.]

5. **How should the tape be read?**
   [The arm circumference tapes have colored bands representing different nutritional states. Each arm circumference has an approximate equivalent to a weight-for-height percentage. They are:

   13.5 cm or greater, approximately equivalent to over 85 percent weight-for-height.

   12.5 cm to 13.4 cm, approximately equivalent to 80 to 85 percent weight-for-height.

   Less than 12.5 cm, approximately equivalent to under 80 percent weight-for-height.

   The amount and degree of malnutrition can be calculated as percentages of the sample. Also reported is the percentage of children with edema (kwashiorkor).]

6. **How should the MUAC measurements be recorded on the KPC Survey Questionnaire?**
   [The Interviewer should record the child's name, date of birth, MUAC category and whether the child had edema or not.]

7. **What is the best way to train people to take MUAC measurements?**
   *[A **Standardization Test** will check for accuracy by having different people measure the same child to determine if there are more errors with some people's measurements than with others. And **Practice, Practice, Practice.**]*

2. **Practice taking accurate MUAC measurements** – 40 minutes

   Demonstrate again the proper technique for measuring MUAC using the protocol. If necessary, have the group revise the written protocol.

   Make available the needed equipment. Divide the participants into small groups (the number of groups depends on how many measuring tapes you have). Tell participants they are going to practice taking MUAC measurements. Give each team a doll or a balloon or have the team members measure each other. Each group should use their protocols to practice. One participant should take the measurement while another participant acts as the observer, reading the protocol. Switch roles until every participant has a chance to practice measuring. Have each group measure a variety of dolls, participants' arms, or other objects. Move around between the groups to make sure proper procedure is being followed.