

# THE MIGRATION AND REMITTANCES SURVEY 2009

Household Surveys for the Africa  
Migration Project in South Africa

TRAINING MANUAL FOR  
FIELDWORKERS



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# **1. INTRODUCTION**

## **1.1 Overview**

The Migration and Remittances Survey 2009 is funded by the World Bank in collaboration with the African Development Bank. The Human Sciences Research Council (HSRC) is required to produce a migration database. In order to meet its obligations under the World Bank project, the HSRC contracted a service provider, the Community Agency for Social Enquiry (CASE) to conduct a face-to-face interview survey by means of a structured questionnaire among randomly selected adult respondents during the period October-November 2009.

'This interviewer and supervisor manual is a field work guide for the World Bank migration and remittance household survey in Sub-Saharan Africa. The goal of this survey is to gather the best possible information on migration and remittances in various countries in Sub-Saharan Africa. For this reason, the manual provides information to field workers who will be administering the survey on how to interact with survey households. The manual also describes the methodology that will be used in the survey, specifically, a quick census of households in census units followed by the actual household survey. The manual also describes and explains the various questions contained in the survey questionnaire, and how these questions relate to one another.

The main objective of this survey is to help improve the impact of migration and remittances on the economic and social situation in sub-Saharan Africa. At present, our knowledge base on migration and remittances in sub-Saharan Africa is quite limited. By providing rich and detailed information on the impact of migration and remittances at the household level, this survey will greatly increase our ability to maximize the socio-economic impact of migration and remittances in Africa. To these ends, the survey will collect nationally-representative information in various African countries on three types of households: non-migrant households, internal migrant households and international migrant households. Comparisons between these three types of households will help policymakers identify the socio-economic impact of migration and remittances in sub-Saharan Africa.

Fieldworkers and supervisors play an essential role in the research process. As a fieldworker or supervisor, you are responsible for collecting the information that will later be analysed and written up as a report. Your main tasks are to attend training, to collect the data by conducting face-to-face interviews using structured questionnaires, to check the questionnaires and then return them to C A S E.

To ensure that the research is carried out in a scientific way, the fieldwork must be carried out according to specific procedures. It is, therefore, particularly important that fieldworkers understand and follow the procedures covered in the training and described in this training manual.

Missing information, or the incorrect selection of respondents, will make it difficult to analyse the data and will impact on the quality of the report that can be produced for the client. High quality data collection is therefore crucial for the rest of the research process and the responsibility for ensuring this lies with you.

## 1.2 Purpose of Training

The purpose of this manual is to assist you in the following ways:

- explaining the background to the study and your role in it;
- providing a common understanding of what this study requires;
- describing your responsibilities as fieldworkers and supervisors;
- describing the specific procedures to be followed;
- explaining the practical details of administering the questionnaire;
- avoiding misunderstandings and ensuring a good working relationship.

## 1.3 Background to the study

Migration generally refers to the movement of people over space and change of residence<sup>1</sup>. This movement may be permanent or temporary and is motivated by several factors which include joining a partner, looking for better employment opportunities or improved standard of living through better services and infrastructure. The history of migration in South Africa can be traced back to the discovery of minerals and the availability of employment opportunities on farms. Labour in the mines and on the farms was drawn from all provinces within South Africa, as well as from other countries in Southern Africa. Mine and farm labourers who had left their homes kept in contact with their original homes through remittances in the form of money and property that they sent to their families and friends and through 'visiting' them. This form of migration became circular with labourers moving between the mines or farms and their homes. The remittances improved the lives and the standard of people left at home<sup>2</sup>. The trend of migration from rural areas to urban areas continued at the dawn of democracy with Gauteng having the largest internal migrant population<sup>3</sup>. Contact between those who migrate and those who remain behind continues through remittances.

## 1.4 Aim of the study

The overall aim of the Migration and Remittances Survey 2009 is to develop a migration database. This will involve the following specific activities:

- conducting a household survey with a view to producing a detailed demographic/economic database;
- collating and preparing a dataset based on the survey;
- producing summary statistics for the analysis of migration and remittance behavior in South Africa.

## 1.5 Definitions of terms

- **AFRICAN DEVELOPMENT BANK** refers to the African Development Bank (AfDB) Group. It is a regional multilateral finance development institution that comprises three distinct entities under one management. The African Development Bank (AfDB) is the parent

<sup>1</sup> Casale, D. and Posel, D. 2006. Migration and remittances in South Africa: Background document on migration and first set of draft questions for inclusion in the National Dynamic Study (NIDS).

<sup>2</sup> Adams, R. and Page, J. 2005. Do International Migration and Remittances Reduce Poverty in Developing Countries? World Development Vol. 33. No. 10. Great Britain.

<sup>3</sup> Crush, J. (ed) 2006. Migration, Remittances and Development in Southern Africa. Migration Policy Series Number 44. SAMP.

institution with two affiliates, the African Development Fund (ADF) and the Nigerian Trust Fund (NTF).

- **COMMUNITY AGENCY FOR SOCIAL ENQUIRY (C A S E)** is an independent South African research NGO, focusing on socio-economic and policy research in support of social and economic justice.
- **CURRENT MIGRANTS** include those household members who used to live in the household, but who are currently living outside the household, either within the country or outside the country.
- **DATABASE** refers to a collection of information that is organized so that it can easily be accessed, managed, and updated. More formally it is an integrated collection of logically related records or files which consolidates records into a common pool of data records that provides data for many applications.
- **HEAD OF HOUSEHOLD** is the person commonly regarded by the household members as their head. The head would usually be the main income-earner and decision-maker for the household, but it is important to accept the decision of the household members as to who is their head. There must be *one and only one* head of the household.
- **HOUSEHOLD** means a person or group of persons, irrespective of whether related or not, who normally live together in the same housing unit and have common cooking and eating arrangements.
- **HOUSEHOLD MEMBERS** refers to persons who are currently living in the same household and have common cooking and eating arrangements.
- **HOUSEHOLD SURVEY** is a survey that is designed to provide accurate, up-to-date information about the characteristics, attitudes and behaviour of a sample of households and individuals on a range of issues.
- **HUMAN SCIENCES RESEARCH COUNCIL (HSRC)** is South Africa's statutory research agency. It focuses on research that generates critical and independent knowledge relative to all aspects of human and social development, while its core business is to conduct large-scale policy-relevant, social-scientific projects for public-sector users, non-governmental organizations and international development agencies.
- **MIGRATION** refers specifically to human migration and denotes any physical movement by people from one district to another, sometimes over long distances or in large groups. People who migrate are called [migrants](#), or, more specifically, [emigrants](#), [immigrants](#), or [settlers](#), depending on the historical setting, circumstances and perspective.
- **REMITTANCES** include the value of money (cash) and food and non-food goods received by the household, either from the current migrant, a non-household member, or a return migrant.
- **RETURN MIGRANTS** include those household members who used to live outside the household, either within the country or outside the country, but who have now returned to live in the household.
- **SUMMARY STATISTICS** are descriptive statistics (such as mean, median, mode, standard deviation, variance, range) that are used to summarise a set of observations. They are used to communicate the largest amount of information as simply as possible.
- **SURVEY** means a research strategy that involves the structured collection of data from a sizeable population.

## 1.6 Role of the interviewer

The interviewer will:

- be patient and tactful when interviewing household members in order to win their cooperation and trust;
- avoid anticipating or suggesting answers from the interviewed household members;
- collect the best quality data and, if necessary, be able to correct completed questionnaires;
- ensure interviewed households of the complete confidentiality of all collected data and the non-taxation purpose of the study;
- follow the instructions established during interviewer training;
- know the content of the survey manual;
- follow instructions given by the team supervisor.

The interviewer will review each completed questionnaire before leaving the household. This verification will help to ensure that each question has been asked and responded to, and that each answer is clear and readable. The questionnaire will be completed with a ballpoint pen and not in pencil.

The questionnaire is not to be revised. Rewriting answers on a new questionnaire would be a source of errors. Answers will be written directly in the questionnaire in a clear and readable form. The interviewer may use the margin of the questionnaire sheet for calculations.

In addition, all remarkable or extraordinary information should be recorded in the sheet margin near the appropriate question or section. This information will help the team supervisor to verify completed questionnaires.

## **2. UNDERSTANDING THE QUESTIONNAIRE**

Fieldworkers and supervisors will be provided with copies of the questionnaire, as well as pens (black or blue for fieldworkers and red for supervisors) and the necessary identification, name tags.

### **2.1 The questionnaire**

The procedure for this household survey is for the fieldworker to administer a structured questionnaire to each selected adult respondent individually through a face-to-face interview.

The survey questionnaire has eleven sections. Every question is important and should be completed as fully and accurately as possible. The goal is to collect the *best possible information* from household respondents on each and every question. All answers are to be recorded on the actual survey questionnaire. Each household member is assigned an ID and this ID remains the same throughout the questionnaire. In other words, the ID of a household member *does not change* from one section of the questionnaire to another. When interviewing household members, interview them one at a time. Do not interview several household members together.

In administering the survey questionnaire, begin with the cover sheet and Section 1: Household Roster. It is very important to complete Section 1 before going on to the other sections of the questionnaire.

During the interview, you will code the respondent's answers and enter them into the questionnaire. **Please not that in all cases it is essential to ensure the confidentiality of the respondent and all the responses.**

The specific sections of the questionnaire will now be discussed.

### 2.1.1 Cover sheet

On this page you will enter codes for province, district, urban/rural, household and respondent, as well as information about the head of the household, the spouse, the address of the household and the number of residents. You will also enter the interviewer or supervisor code, the date of the interview and the start and end time of the interview. It is very important to fill in this cover sheet correctly, so that if some information is incorrect, the household can be located again. Be sure to record any comments or remarks at the bottom of the page.

### 2.1.2 Questionnaire for the Head of the Household

#### *Section 1: Household Roster (Q1.1-Q1.18)*

This section collects basic demographic data on each and every member of the household. It is *very* important that this section be completed accurately and completely. Be sure to record the information for each person *on a separate line*. In other words, line 1 is for information on the household head, line 2 is for the spouse, etc.

List all members currently living in the household in the column for Q1.1. In Q1.2 to Q1.11, information is collected on the relationship of each member to the household head, his/her sex, age, marital status, birth place, religion, ethnicity and language. Note that the household head is not necessarily the “*father*” or the “*mother*”. The age of the person should be as at the last birthday.

Q1.12-Q1.15 and Q1.18 ask for information on the educational status of each member of the household, while Q1.16 and Q1.17 are about the current work situation and occupation of each member of the household.

#### *Section 2: Housing Conditions (Q2.1-Q2.7)*

Section 2 collects information on household conditions and characteristics. Please interview the main person responsible for each dwelling. In this section *there is only one response for each household*.

Q2.1 asks for the tenure status of the dwelling, while Q2.2 and Q2.3 ask about its construction and material of the exterior walls. Information on the room used for cooking and the total number of rooms are in Q2.4 and Q2.5. The remaining questions in this section, Q2.6 and Q2.7, ask about the presence of electricity and the source of drinking water for the household, together with their costs per month.

#### *Section 3: Household Assets (Q3.1-Q3.2)*

Section 3 is *very* important because it collects information on the assets and expenditure of the household. The goal of this section is to understand the current welfare status of the household, that is, is the household rich or poor. Please note that *there is only one response for each household*.

Q3.1 asks a series of questions on the type of assets owned by the household. Assets included here are both immovable assets (land, house) and movable assets (bed, radio, bicycle, cart and car). Please note that these are *assets owned by the household at present*, that is, *on the day of the interview*. In contrast, Q3.2 asks about assets owned by the household 12 months ago.

#### *Section 4: Household Expenditure (Q4.1-Q4.4)*

This section collects information on the household expenditure and use of financial services. The purpose of this section is to see if households with migrants and remittances tend to use banks more often than households without migrants.

Q4.1 asks a series of questions about household expenses. Please note that this expenditure section is divided into two periods of recall: the past one week and the past six months. For household expenditures which are frequent (like expenditures on food, meat and transportation), the expenditure period is the past one week. For household expenditures which are less frequent (like expenditures on clothing, furniture, housing, education and health), the expenditure period is the past six months. Please make sure to record *all* household expenditures in a particular category. For example, the expenditure category “food” includes expenditures on all types of food: grains, maize meal, pulses, fruits, vegetables, etc.

Q4.2 asks whether anyone in the household has a bank account. It is important here to copy the ID of each and every person in the household who has a bank account. Q4.3 collects information on how long each person has had a bank account and Q4.4 asks why each person decided to open a bank account.

*Section 5: Health Conditions (Q5.1-Q5.11)*

This section focuses on the health conditions of members of the household. Q5.1 and Q5.2 ask about any illnesses or injuries incurred during the past three months, while Q5.3 asks about the time off due to illness or injury during the past six months. Q5.4-Q5.6 focus on who cared for the respondent, or who was consulted during the illness, while Q5.7 is concerned with where the respondent went for consultation during the past six months. Q5.8-Q5.10 ask about the time taken to reach the nearest healthcare facility and the cost of transportation and consultation. The section ends with Q5.11 which asks how household members obtain information about various health issues.

*Section 6: International and Internal Migration and Remittances from Household Members (Q6.1-Q6.69)*

For this extensive section, the focus is on all adult household members and non-household members (over 15 years old) who left at some point in the past to live somewhere else. In Q6.1, make sure you list household members first, followed by non-household members. Q6.2-Q6.7 ask for information about the household and non-household members, including relationship to the household head, sex, age, marital status and ID.

Q6.8-Q6.12 ask for place of birth, religion, ethnic group and languages spoken or understood. Q6.13-Q6.16 are concerned with details about when and why a person left the household, while Q6.17-Q6.19 ask for information on the decision to move, where to go and how was the move funded. Q6.20-Q6.23 are concerned with details of where the respondent lives, how long s/he has been there and who lives with him/her and whether his/her spouse or children live in the household.

Q6.24-Q6.32 relate to the educational level and related details of the respondent, while Q6.33-Q6.41 ask for information about the respondent’s work situation, occupation, employer, duties and income.

The next set of questions, Q6.42-Q6.53, asks for information about any money sent from the household to an emigrant, to whom, when, how often, by what method, whether regular or not, whether for a specific purpose or not. Q6.54 asks about how this money was spent in the past one week (food, cooking fuels, bus/taxi fares, petrol); and in the past six months (clothing, household goods, rent, electricity, education, health, house or land purchase, and so on). Q6.55 asks whether the money was intended for a particular purpose, while Q.56 asks if the money has to be repaid.

Next, Q6.57 asks if the money that was sent enabled someone in the household to achieve a specified level of education. Q6.58-Q6.60 inquire about goods sent to or



brought into the household by an emigrant during the past 12 months and whether repayment is required.

The focus of Q6.61-Q6.66 is on communication and various household responsibilities. Q6.61 and Q6.62 ask about the frequency of communications with the emigrant and the methods used. Q6.63 asks about the type of information supplied by the emigrant, while Q6.64-Q6.66 deal with the kinds of activities the emigrant assisted with before leaving, how the household has coped since the person left and who took on the additional responsibilities.

Lastly, Q6.67 asks for information about a number of activities (such as obtaining a loan, accumulating savings or debts, building a dwelling, buying a home) conducted by the household after the emigrant left. Q6.68 requests information about how the household spent the loan, on short term activities (food, cooking fuels, transport) and longer term matters (clothing, household goods, rent, education health, and so on). Q 6.69 asks simply if the household loan has been repaid.

#### *Section 7: Return Migration (Q7.1-Q7.38)*

This section deals with return migrants, that is, all adult persons (over 15 years old) who are currently living in the household and who have lived in some other place for at least three months in the past five years.

Q 7.1 requires the names of all adults currently living in the household who have lived somewhere else for at least three months over the past five years. Please note that you should interview the return migrant him/herself. However, if s/he is not available for the interview, you must interview a person who is able to answer the questions on his/her behalf.

Q 7.2-Q7.6 ask where the return migrant moved to, when, when s/he returned to the household, why s/he moved and why s/he moved back. Q7.7-Q7.10 asks for details about any schooling or tertiary education that took place during the last migration episode and what level was achieved. Q7.11 and Q 7.12 probe for information about the work situation and occupation during the last migration period, while Q7.13 asks why the migrant returned.

Q7.14-Q7.21 all ask for details of any money sent to the household while the migrant was away: was money sent, to whom, by what method, how many times in the past 12 months, whether it was done regularly, was it approximately the same amount each time, how much was sent in total and finally, in which month was the most money sent. Q7.22-Q7.24 requests details about whether the money sent was for a particular purpose, what the purpose was and whether the household must repay the money. Q7.25 is concerned with whether the money sent enabled a household resident to achieve a given level of education, while Q7.26 asks if the money sent was for a specific event, such as war or natural disasters.

Q7.27-Q7.29 ask for details of any goods sent to the household while the migrant was away, which goods were sent and whether the household must repay the migrant for these goods.

The focus of Q7.30-Q7.35 is on communication and various household responsibilities. Q7.30 and Q7.31 ask about the frequency of communications with the emigrant and the methods used. Q7.32 asks about the type of information supplied by the emigrant, while Q7.33-Q7.35 deal with the kinds of activities the emigrant assisted with before leaving, how the household has coped since the person left and who took on the additional responsibilities.

Finally, Q7.36 asks for information about a number of activities (such as obtaining a

loan, accumulating savings or debts, building a dwelling, buying a home) conducted by the household after the emigrant left. Q7.37 requests information about how the household spent the loan, on short term activities (food, cooking fuels, transport) and longer term matters (clothing, household goods, rent, education health, and so on). Q 7.38 asks simply if the household loan has been repaid.

### 2.1.3 Questionnaire for In-Migrants only – Remittances senders

#### *Section 8: Migration Status (Q8.1-Q8.21)*

The questions in this section are for those household members who migrated to this place, either from another country or from another part of South Africa.

In Q8.1 asks you to list all the household members who migrated to this place. Q8.2-Q8.6 enquire about when the migrant moved to this place, where s/he moved from, the highest level of schooling achieved in that place, how many years of schooling were completed and what level of tertiary education, if any, was achieved.

Q8.7-Q8.11 ask why the respondent migrated, why the current place was chosen, who decided on the move, who provided the necessary information and what was the main source of funding. The focus of Q8.12- Q8.21 is on the migrant's work situation, i.e., whether working or not, is there a contract, how long did it take to find the job, how many days per week are worked, a description of the current employer, whether the respondent has managerial or supervisory duties, the approximate net income, whether the respondent contributes to any social benefit schemes, how long it takes to reach the nearest public transport and how long the person waits for public transport.

#### *Section 9: Remittances (Q9.1-Q9.17)*

This section asks the migrant about remittances, in the form of money or goods, sent to other people wherever they may be living.

In Q 9.1 and Q9.2, the respondent is asked to indicate whether s/he has relatives or non-relatives living in the place where s/he lived before and where those people are living now. Q9.3-Q10 ask if the respondent sent money or goods to those persons in the past 12 months, how it was sent, how many times, if sent on a regular basis, if it was the same amount each time, the value of what was sent in the past 12 months, in which month was the most amount sent, and whether it was in response to war or a natural disaster.

Q9.11-Q9.14 ask if the respondent sent money or goods in the past 12 months for a particular purpose, what the purposes were for sending money, whether the person must repay the money and whether the money or goods enabled anyone in the household to achieve a given level of education. Finally in this section, Q9.15-Q9.17 enquire about whether goods were sent to anyone in the past 12 months, what type of goods were sent and whether the recipient must repay the respondent for these goods.

#### *Section 10: Ties with areas of origin (Q10.1-Q10.12)*

This section focuses on the migrant's links with his/her area of origin. Q10.1-Q10.5 ask how often the respondent communicates with a person 'at home', how s/he communicates, what information is communicated, what activities were assisted with and whether someone else has had to take on these activities when the migrant moved away.

Q10.6-Q10.10 ask how often the respondent visited a person in the past 12 months, how often that person visited the respondent, whether the respondent encouraged

friends and relatives to move here, whether s/he would be willing to help them move here, and what kind of help would be provided. Finally, Q10.11 and Q10.12 ask if the respondent has a bank account and what is it used for.

*Section 11: Networks (Q11.1-Q11.3)*

In this final section, Q11.1 asks whether the respondent belongs to any groups, organisations, networks or associations, which particular groups or organisations (Q11.2) and whether there is any interaction with similar groups outside the town or country (Q11.3).

#### **2.1.4 Concluding the interviews**

At the end of every interview, remember to thank each respondent (head of household, return migrant, in-migrant) for his/her time, co-operation, willingness to be interviewed and the information that has been provided.



## **3. METHODOLOGY**

The main purpose of the household survey is to gather large scale data so that relevant and appropriate generalisations may be made. As previously stated, the procedure for the survey is to administer a structured questionnaire to a number of randomly selected adult respondents through face-to-face interviews.

### **3.1 Target group**

This study focuses on Gauteng and Limpopo provinces only. The target group consists of households in all communities. The survey will be conducted among metro and non-metro households. Non-metro households include those in:

- small towns,
- secondary cities,
- peri-urban settlements and
- deep rural areas.

From each selected household, one adult respondent will be selected to participate in the study.

### **3.2 Sampling**

It is very important that the correct people are requested to be interviewed in order to complete the questionnaires in the survey. If the random selection procedures are not followed, we will not be able to say that the survey findings are representative of migrants in South Africa or those in the study provinces.

#### **3.2.1 Selecting a household**

This has been done for you. A random sample of enumeration areas (EAs) has been drawn up and the details of dwellings in each EA were obtained. Random sampling has been used to select the households that will participate in the study. The lists of these households, together with their contact details, will be provided for fieldworkers and supervisors.

In the event of difficulties with accessing a particular household, the standard substitution procedures used by C A S E (as per instructions in the training) will be implemented. The details of the original and substitute households must be recorded.

#### **3.2.2 Selecting a respondent**

One adult respondent is to be selected from the adult household members at each and every household in the sample. If there is more than one adult, the fieldworker will use the random number grid (as per instructions in the training) to select a respondent at random. There must be strict adherence to all facets of the sampling principles and a record of the procedure must be kept for reference purposes.

## **4. QUALITY CONTROL**

HSRC takes quality control **extremely seriously**. Supervisors are expected to check that all questionnaires have been completed fully and correctly, so that immediate feedback can be given to the fieldworker. Supervisors will check the completed questionnaires on a regular basis and must make sure they are correct before sending them on to the C A S E offices.

In addition, a member of the HSRC and or C A S E fieldwork department will conduct physical check-backs on a selection of each fieldworker's questionnaires and HSRC will conduct random unannounced checks as and when opportunity arises. They will also ensure that the questionnaires have been completed correctly.

## **5. ROLES AND RESPONSIBILITIES**

### **5.1 Fieldworkers**

The main duty of the fieldworkers is to collect information from respondents through administering the questionnaires. In addition to the duties specified in the contract, fieldworkers should:

- Attend the training and ensure they understand all concepts. Ask questions if unsure.
- Select respondents according to the specifications of the study.
- Properly and neatly complete the required information on the cover page of the questionnaires provided.
- Check that all questions are answered and those with skips were properly skipped.

### **5.2 Supervisors**

The role of supervisors is similar to that of fieldworkers. In addition to the duties in the contract, supervisors should:

- Attend the training.
- Physically identify the households selected using the address lists provided.
- Assist fieldworkers to identify the respondents.
- Provide a link between fieldworkers and the CASE fieldwork department.
- Assist fieldworkers to answer queries from respondents and check that questionnaires have been completed correctly and completely.
- Provide training and refresher training to fieldworkers on the field.
- Conduct check-backs and quality control on completed questionnaires.
- Take on roles in the field as directed by CASE fieldwork department

### **5.3 Administering questionnaires**

This requires the following skills from the fieldworker:

- Proficiency in the local languages.
- Good communication skills.
- Good administrative skills.
- Integrity.
- Confidence.

If you have any questions, or are unsure of what to do, contact your supervisor or a member of C A S E **immediately**. It is better to make sure rather than administer the questionnaires incorrectly. **PAYMENT WILL ONLY BE FOR CORRECTLY COMPLETED QUESTIONNAIRES.**

If you think you may not be able to complete your allotted questionnaires on time, it is crucial that you contact your supervisor as soon as you become aware of the problem. This will enable the C A S E fieldwork co-ordinator to find a fieldworker to assist you.

## 5.4 Important points to remember

5.4.1 The respondent has several rights that must be respected:

- the right to know the true purpose of the research;
- the right to participate voluntarily in the study;
- the right to privacy;
- the right to decide which questions to answer.

5.4.2 You should introduce yourself to the respondents and inform them of the purpose and goals of the study. It is important that respondents are informed about the kinds of questions that will be asked.

5.4.3 People have a right to decide not to participate once you have explained what the survey is about. It is important to explain that their participation is voluntary and that they can refuse to answer the questionnaire if they feel uncomfortable. However, explain that their participation is important because the information they provide will enable a full and accurate report to be written. **Do not** pressure respondents into taking part.

5.4.4 Remember that you are required to protect the confidentiality of the respondents. As a fieldworker you **must not** discuss the responses given by the respondents with anyone outside the research team. Sharing information about the respondents with somebody outside the research team is in direct violation of the confidentiality agreement that would have been established with the respondents. It is very important for the interviewer to maintain professionalism throughout the research process.

## 5.5 Interviewer security measures

Most respondents are friendly and helpful and you will probably not encounter any problems of personal safety. However, it always helps to follow a few simple safety rules.

- Do not carry unnecessary money or valuables.
- Dress in a modest and inconspicuous way.
- Be careful about your Identity Card.
- If you feel it is necessary, you may bring a companion with you, but that person should remain outside during the administration of the questionnaire.
- The administration of the questionnaire can take place in a public place if the respondent or fieldworker thinks it is necessary.
- You may casually mention that your supervisor has a list of your appointments, and may come by at any time for a routine quality control check.
- Be practical, calm and professional – and careful – when dealing with possible sexual

harassment.

- If you feel you are in any danger for any reason, STOP THE ADMINISTRATION OF THE QUESTIONNAIRE IMMEDIATELY AND LEAVE! Tell the respondents that you or your supervisor will come back at a later time.

## 5.6 Some standard responses

You may be asked questions by the respondents. Below are some common questions and examples of responses that you can give.

### 5.6.1 Who is doing this survey?

[Show your Identity Card.] "I work for C A S E, which is a research organisation in Johannesburg and we are conducting this research on behalf of the HSRC."

### 5.6.2 Why have I been selected?

"Your household was selected by a scientific random sampling method, along with other households in Gauteng and Limpopo. You were selected at random from the people in your household, so your opinions are very important to us. If we chose another person, we would not have a complete, representative picture of people's views about migrants."

### 5.6.3 I don't have time to be interviewed

"The questionnaire will only take about 60 minutes. Shall I come back at a time that suits you better?"

### 5.6.4 I am too busy

"When would be a better time for me to come back? I can make an appointment for a time that is more convenient for you. But it is very important for us to obtain responses from everyone in the sample. Otherwise we won't know what people like you think about these issues, which are important for the whole country."

### 5.6.5 I do not know enough to give good answers

"In this survey, the opinions of all the respondents are important. All the respondents have valuable comments, opinions and contributions that will assist with the research."

### 5.6.6 If the respondent is concerned about confidentiality

"The same questionnaires are being answered by 2 000 people throughout Gauteng and Limpopo. Your responses will be totally and absolutely confidential. You will not be identified by name. We will be summarising the responses and opinions of groups of people, not your individual responses and opinions. By law, we are not allowed to publish any information that identifies individual people. I can be prosecuted if I reveal any information from your responses."

### 5.6.7 If a respondent is annoyed and simply refuses to participate

"Is there any particular concern that you have?" Try to find out if there is a concern about confidentiality, no time, no information, etc. Then answer using the ideas above. If there is still no co-operation, keep calm, thank the person politely, leave the premises and notify your supervisor.

### 5.6.8 The respondent presses for more information than you can provide:

"Well, I am a professional researcher. You could talk to my supervisor, or you could contact the research managers, whose contact details are provided on the questionnaire information sheet. They would be glad to explain the survey to you." But don't bring in your supervisor unless you think it is really necessary.

## 6 ADMINISTRATIVE LOGISTICS

### 6.1 Contracts

By law, every fieldworker and supervisor must sign a contract for each new project. A contract is important because it is a legal document and can protect you from being exploited. Always insist on signing a contract before you start working.

The C A S E contract that you will sign is a standard document that has a space for you to fill in your personal details, bank details (final payments are done electronically), the nature of the work you will be doing (usually 'interviewer'), and space for you and a CASE representative to sign. It also stipulates how much and for what work you will be paid. Each contract must be completed and signed by both parties prior to commencement of employment.

### 6.2 Payment for transport

Payment for travelling is not included in the 'payment per questionnaire'. It is therefore important for fieldworkers to keep a meticulous record of their travelling expenses so that they can be properly reimbursed.

If you are using public transport, you should keep a record of the time, date and cost of the trip, including point of departure and arrival, and C A S E will reimburse you for this amount. If you are using your own car, you should write down the opening and closing odometer reading for each trip, indicating what the purpose of the trip was, and you will be paid R1.50 per kilometre on receipt of a claim form including this information. Written authorisation to use a private car must be received from the Fieldwork Co-ordinator. Transport money (for your own car or public transport) will only be paid if agreed upon with C A S E in advance, so make sure you discuss your plans with your supervisor.

### 6.3 Hired car

For some areas a car will be hired for you. The Fieldwork Administrator will book you a car and will give you (the driver) a voucher. This voucher must be handed in together with your driver's license when collecting the car. C A S E uses Tempest car hire wherever possible. C A S E only books GROUP A (MANUAL) CARS

- A record of daily kilometres travelled must be recorded and all toll slips and petrol slips must be kept for submission.
- Cars should be collected wherever possible as delivery of vehicles costs extra.
- The car *must* be refuelled just before returning to Tempest or Imperial. Car hire companies add an extra charge to our bill if they have to fill up the car. If you forget to refuel the car before returning it to the car rental company, the amount incurred will be deducted from your salary.
- When the car is returned, make sure Tempest staff checks the car for damages.



## 6.4 If an accident should occur

- Immediately inform the Fieldwork Coordinator once any damage or a scratch has occurred to the rented car. N.B. It does not matter how small the scratch or damage can be, it has to be reported to the Fieldwork Coordinator immediately.
- Report the accident to the nearest police station within 24 hours.
- A written report of the accident must be submitted to the Fieldwork Coordinator.
- Supply the Fieldwork Coordinator with the following documents:
  - Police Case Number
  - Copy of Identity Document
  - Copy of Driver's licence
- The driver of the rented car will be held liable for the damages to the car if it is found that the accident happened due to his or her negligence.
- The liability of the driver will be assessed from information from the police report and the driver. **If the driver is found to be liable due to his or her negligence, s/he will be expected to pay either the entire insurance excess, or a proportion thereof (as decided by C A S E management).**

## 6.5 Tax

The law says that all fieldworkers, even though you are a casual employee, must be taxed if your monthly earnings exceed a set amount.

## 6.6 Data Capturing

Where possible and to enable speedy and accurate entry of data, it will be recommended that data from the questionnaires be captured in the field. This will involve supervisors co-ordinating with the data entry team to enable fieldworkers to pass-on the completed questionnaires to the data entry team on a day by day basis. This would enable any errors of omission and commission to be picked-up and rectified on a daily basis. Where daily data entry is not possible the questionnaires will be sent by courier to C A S E as explained in section 6.7 below.

## 6.7 Couriering of questionnaires

C A S E has an account with Speed Services. This service is available in all South African Post Offices and we use it to ensure that questionnaires can be returned in good time to the C A S E offices. Supervisors are given waybills and tracking numbers and do not have to pay for this service. **YOU MUST ENSURE THAT YOU HAVE A WAYBILL OR A TRACKING NUMBER.**