Tool Design and Testing

Tool Design and Testing is the part of the process where we consider more specifically *what* do we need to learn from the assessment and *what* are we trying to accomplish with the program.

This part of the process has 3 key steps:

1. Design
2. Test
3. Revise and Finalize (includes creating supporting documentation)

A predecessor of this activity is ***Tool Selection***, which ideally has taken place when the assessment methodology was created. That selection was based on criteria relevant to the program goal, the key principles, program objectives and constraints and limitations. (See *Scope and Methodology* tip sheet for more details.)

Tool Design:
Once we've selected the tools we will use, we move to designing our tools. Some key tips for tool design are:

- Build on what we've done: There are many examples within Mercy Corps[1] and elsewhere of effective survey instruments (Women's Refugee Commission,[2] International Labor Organization[3], etc.) It is appropriate to use these as a base for developing your set of tools.

- Take the time to contextualize: At the same time, if we copy too much from existing surveys we risk missing key program-specific or contextually relevant questions. Therefore it is advisable to consider each question for relevance to our specific assessment Scope.

- Make the design process as participatory as possible: Our experience has demonstrated in multiple countries, that survey questions that are crafted with the active input of our beneficiaries or program participants are typically more relevant and appropriate for our programming. This is particularly relevant for focus group discussion guides (FGDs) given that this instrument is directly focused on understanding our beneficiary group. For example, for our YYC program in Kenya, we brought together 20 youth as part of our assessor training workshop to develop tools and supporting tip sheets. They focused on FGDs and culled through a list of questions to identify the ones more relevant and appropriate and the likely utility of the answers.

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[1] *Mercy Corps Market Analysis Resource Guide* (2014).
[2] *Women's Refugee Commission Market Analysis Toolkit for Vocational Training.* http://womensrefugeecommission.org/programs/livelihoods/research-and-resources/796-market-assessment-toolkit-user-guide
[3] *International Labour Organization, School to Work Transition Surveys*. http://www.ilo.org/employment/areas/WCMS_140862/lang--en/index.htm

If we are unable to draft the tools in a participatory manner then having a vetting step may be worthwhile. This could be as simple as having a group of beneficiaries review the draft tools looking for redundancies, missing questions, ineffective language, etc. A basic community validation of the tools ensures that the questions we are asking are relevant to our key program beneficiaries.

- Carefully consider how quantitative questions are phrased: In particular, avoid open ended questions whenever possible, focusing on multiple-choice questions that have specific answers which can be coded, simplifying data processing. Reach out to M&E expertise as necessary for development and design of survey instruments.

- Consider needed internal and external approvals for your survey instruments: If that will be required, ensure you build that feedback loop into your workplan.

- Consider what kinds of instructions and tip sheets will be needed for your tools. This will likely be developed later in the process, but documenting the specifics of these while developing your tools can save time and effort later.

Testing:

The goal of survey testing is to validate that the questions on our tools are easily understood, don't require excessive clarifying, don't get overly negative reactions, flow logically and that it does not take too long. For example, we typically aim to have our business survey last between 30-45 minutes, as we know many business owners are very busy and likely do not have much time to participate in our survey. Most often, testing is done on the quantitative business survey due to the number of questions it contains.

There is no absolute right time to test. Ideally testing should happen close to when the actual assessment will take place, but far enough in advance to enable tool modifications to be completed (keeping in mind the need for "final" approval of the tools if necessary).

There are some situations where due to time or logistic considerations you will be unable to test. In that case it is advisable to use the *Daily Debrief* to discuss any survey issues and make changes if necessary and feasible.

The testing process includes determining the sample size: The size of the sample should be determined by how many different segments will actually be surveyed that might respond differently to the survey questions. For example if we are surveying businesses of different sizes, we might test our survey on a very small business and a larger firm. Or if we know we are focusing on agriculture business and manufacturing businesses, we might test with businesses in each sector. Feasibility should be a consideration in how many businesses we test with. One key element in testing is to ensure that the test is conducted or observed by a staff member charged with gauging the receptivity and flow of the test. They will be responsible for collecting feedback on the test and communicating that back to the assessment team.

Revise and Finalize:

The final step involved processing the feedback from the test. This includes making decisions about what should be changed in the survey and making those changes. How you determine what to change should be part of a discussion between the assessment manager and any technical support involved in the assessment. Typically, there is no need to re-test after revisions have been made, unless the survey has undergone significant changes and your schedule allows it.

Supporting Documentation:

As part of finalizing the survey, it is also often necessary to create supporting documents. These materials may include:

- Scripts for assessors to follow which include basic language on the program and assessment;
- Fact sheets about the program overall;
- An official letter from Mercy Corps explaining the survey and how the information will be used;
- Glossaries for specific technical terms on the survey instruments;
- Tip sheets that provide definition and guidance on some of questions;
- General guidance on techniques useful for administering the survey (i.e. interviewing or surveying, or engaging with private sector actors, etc.)

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