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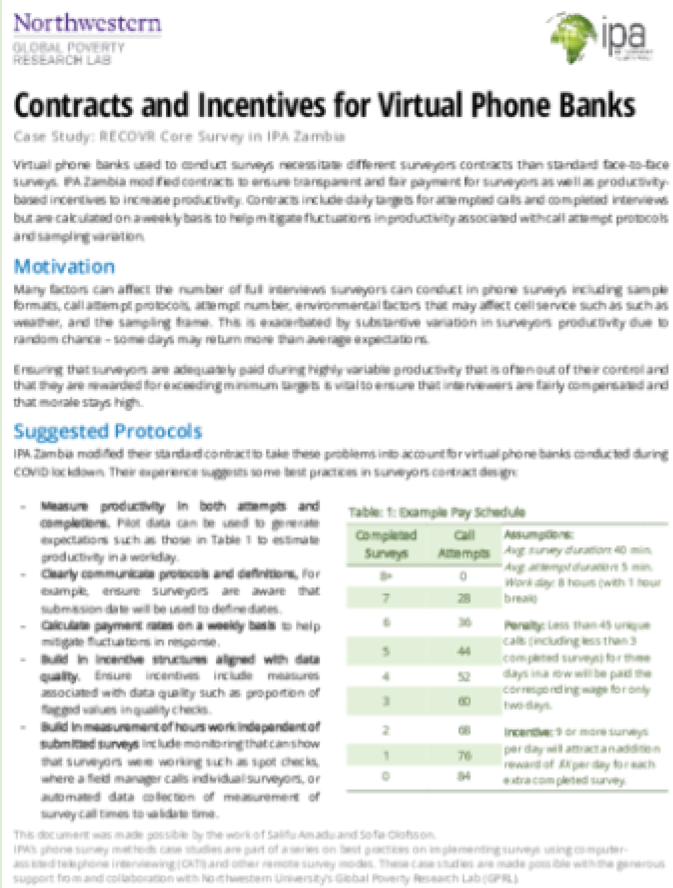

Northwestern GLOBAL POVERTY RESEARCH LAB

ipa

Contracts and Incentives for Virtual Phone Banks

Case Study: RECOVR Core Survey in IPA Zambia

Virtual phone banks used to conduct surveys necessitate different surveyors contracts than standard face-to-face surveys. IPA Zambia modified contracts to ensure transparent and fair payment for surveyors as well as productivity-based incentives to increase productivity. Contracts include daily targets for attempted calls and completed interviews but are calculated on a weekly basis to help mitigate fluctuations in productivity associated with call attempt protocols and sampling variation.

Motivation

Many factors can affect the number of full interviews surveyors can conduct in phone surveys including sample formats, call attempt protocols, attempt number, environmental factors that may affect cell service such as such as weather, and the sampling frame. This is exacerbated by substantive variation in surveyors productivity due to random chance – some days may return more than average expectations.

Ensuring that surveyors are adequately paid during highly variable productivity that is often out of their control and that they are rewarded for exceeding minimum targets is vital to ensure that interviewers are fairly compensated and that morale stays high.

Suggested Protocols

IPA Zambia modified their standard contract to take these problems into account for virtual phone banks conducted during COVID lockdown. Their experience suggests some best practices in surveyors contract design:

- **Measure productivity in both attempts and completions.** Pilot data can be used to generate expectations such as those in Table 1 to estimate productivity in a workday.
- **Clearly communicate protocols and definitions.** For example, ensure surveyors are aware that submission date will be used to define dates.
- **Calculate payment rates on a weekly basis** to help mitigate fluctuations in response.
- **Build in incentive structures aligned with data quality.** Ensure incentives include measures associated with data quality such as proportion of flagged values in quality checks.
- **Build in measurement of hours work independent of submitted surveys.** Include monitoring that can show that surveyors were working such as spot checks, where a field manager calls individual surveyors, or automated data collection of measurement of survey call times to validate time.

Table: 1: Example Pay Schedule

Completed Surveys	Call Attempts
8+	0
7	28
6	36
5	44
4	52
3	60
2	68
1	76
0	84

Assumptions:
Avg. survey duration: 40 min.
Avg. attempt duration: 5 min.
Work day: 8 hours (with 1 hour break)

Penalty: Less than 45 unique calls (including less than 3 completed surveys) for three days in a row will be paid the corresponding wage for only two days.

Incentive: 9 or more surveys per day will attract an addition reward of *X* per day for each extra completed survey.

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