

KEY INFORMANT TRAINING GUIDE

SAVVY

Sample Vital Registration with Verbal Autopsy



MEASURE Evaluation
U.S. Census Bureau

Key Informant Training Guide

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Sample Vital Registration with Verbal Autopsy



U S C E N S U S B U R E A U
Helping You Make Informed Decisions

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ABOUT THIS TRAINING GUIDE

Training is one of the most important parts of preparing for identifying and reporting of deaths in the SAVVY area. The purpose of training is to make sure that during death reporting, every death in the area is included in the SAVVY system and the information recorded is correct. During the training, competent key informants (KIs) will be recruited to carry out Sample Vital Registration with Verbal Autopsy's (SAVVY's) mortality surveillance activities. Key informants will be responsible for continuous reporting of deaths occurring in their assignment areas (AAs) by locating a household where death has occurred, by recording basic socio-geographic particulars of the deceased and household identification, and by arranging with the bereaved families on the date for a verbal autopsy (VA) interviewer to visit them.

New and existing key informants will be trained. The training will be conducted annually and will consist of class work as well as field practice. The focus of the training is to make sure that key informants collect complete and reliable information on the location of the household and on the identity of the person who died. They will also be trained on how to communicate effectively with the community members and the VA interviewers during their course of work. At the end of training, all key informants are expected to be experts and to be confident during fieldwork.

INSTRUCTIONS TO THE TRAINER

This training guide will help you teach all the skills necessary for a person to become a competent key informant for the SAVVY death reporting system. In addition, there are some guidelines provided in this manual and other materials you can follow to help achieve the objectives of the training.

The key to an effective training session is preparation. If you are prepared in advance, your confidence will be apparent to the trainees. No amount of classroom technique or speaking skill can overcome the handicap of not knowing your subject matter.

Always treat your trainees with respect and courtesy. Remember, they will be working for you.

Study the Training Materials in Advance of the Session

Read and study all the training materials well in advance of the session, including this training guide, the SAVVY *Key Informant's Manual*, the key informant's death register, the job aids for use in the field, the portion of the SAVVY *Supervisor's Manual* that has to do with key informants and training, and any other materials that will be used in the training session. Do not be concerned about your presentation during your initial reading of these materials; concentrate instead on understanding the operation. If you do not understand a particular part, reread the portion that covers that part or search for added information in the manuals. If necessary, ask your supervisor for assistance. Before training begins, be certain that you understand every phase of the key informant's role in the SAVVY system.

Practice

Read and review this entire training guide and the training materials several days before the training begins. At this point, begin to concentrate on your presentation and the types of questions the trainees are likely to ask.

If possible, conduct a small dry-run presentation on your own. This will give you a chance to practice using the handouts. It is embarrassing and time consuming for you to have to interrupt training to find a form or handout. It is even worse when you do not know which reference to use and when to use it.

It is important to try and think about possible questions that may be asked during training and try to prepare for them in advance as much as possible by noting important sections in your materials and knowing the topics covered. However, there will always be some questions that are unexpected. In these situations, your answers must be the same as would be given by any other trainer in the country. In order to ensure that answers are consistent, you should contact your supervisor with any unusual or difficult questions that you receive during training so that the supervisor can share the answers with all the other trainers conducting key informant's training.

Classroom Preparation

Preparing the classroom for training is as important as preparing yourself to conduct the training. Locate and inspect a training site.

If a training site has been selected for you — If a site has already been selected, do the following:

- ✘ Meet with the person in charge of the training site.
- ✘ Confirm the earlier agreement.
- ✘ Verify that the space will be available and ready on the days you need it.
- ✘ Inspect the space to make sure it meets the basic requirements for the training site. (See the list below on this page, “A training site should meet the following requirements.”)
- ✘ Notify your supervisor when you are satisfied with the site and have confirmed the earlier arrangements. Discuss any problems with your supervisor.

If a training site has not already been selected for you — If a site has not been selected, visit potential sites until you locate one with adequate space that is available during the scheduled training. Use the following suggestions as potential sites:

- ✘ schools, including colleges or vocational training centers
- ✘ churches, synagogues, or mosques
- ✘ community or recreation centers
- ✘ clubs or lodge meeting halls
- ✘ libraries
- ✘ post offices
- ✘ military centers
- ✘ other government offices

A training site should meet the following requirements. It should be:

- ✘ rent-free (if free space is not available, DO NOT make a commitment to rent training space, contact your supervisor for help);
- ✘ quiet and free of distractions;
- ✘ large enough to accommodate all of your trainees, but not too large;
- ✘ equipped with sufficient desk or table space, and seating for all the trainees;
- ✘ well ventilated, as weather requires;
- ✘ have some type of restroom facilities, either on-site or nearby and available for use during training;
- ✘ have eating facilities nearby, or you must tell trainees to bring a lunch; and
- ✘ centrally located, to limit travel by all trainees.

Once the training site is set and your trainees have been selected, you will receive a partially prepared list of trainees, with each trainee's name and where they come from (contact address). If it has not already been done by your supervisor or another SAVVY officer, notify your trainees of the date, time, and place of training.

Prepare the Training Room for the Training Session

Arrange the seats and tables so that each trainee can easily see and hear you and see any materials that you'll be using during training. Provide enough space so that each trainee has room to spread out his/her training materials or take notes.

A list of materials needed both by you and your trainees can be found near the end of this chapter. Several days before the training session, make sure you have all the needed materials. Before trainees arrive on the first day of training:

- ✘ Place a key informant training session package for trainees at each trainee's seat.
- ✘ See that lighting and ventilation are adequate.
- ✘ Check the locations of water fountains, rest rooms, and lunch facilities.

Name cards are included in each trainee's package, as well as your own training session package. At the first training session, have each trainee write his or her name on a name card using the black marker found in your training package. If necessary, make a quick seating chart for your own reference once everyone is seated. The seating chart will help you to call on trainees during training and help you remember their names. Ask the class to keep their seats for the rest of the training session.

Do not allow trainees to smoke or eat in the training room during training sessions. Request that all cell phones be turned off during training. Advise trainees of the time and duration of training breaks and the location of nearby bathrooms and dining facilities, and any necessary emergency procedures.

How to Use a Training Guide

Why we use training guides —Training guides are used for the following reasons:

- ✘ Training guides ensure **uniform training**. If all trainers use the same training materials, then all trainees receive the same training. All trainees need to receive the same instructions so they will perform their duties in the same manner.
- ✘ Training guides control the **cost and time of training**. The length of time for training is limited, and having a training guide helps trainers to emphasize the most important topics during the set training period. You should make every effort to keep to the training schedule provided. Uniform training keeps the costs of training within the budget.
- ✘ Most supervisors do not have the time or resources to design and prepare a training program. The training guide **frees the supervisor** from the burden of

preparing his or her own training program, allowing him or her to concentrate on working with the trainees.

Classroom Training Techniques

Keep training upbeat — This training guide will instruct you in which topics you should cover and in what order during training. However, merely reading a manual or form aloud does not make for an effective training session. The trainer must keep the session upbeat. Only you, the trainer, can make the session effective. You must watch for signs that reflect how well the trainees are learning and how well you're holding their attention. Signs to watch for include trainees' classroom participation, their answers to your questions, and their own questions to you.

If trainees show signs of boredom or fatigue, take a short break, ask questions, or find other ways to keep trainees involved in the training session.

Techniques to use — If you follow the training techniques listed below, you'll be able to manage the attention of the class and guide the trainees through an effective learning experience:

Study this guide. Be able to deliver training efficiently and accurately. Know the materials so well that when trainees ask questions that will be covered later in the training, you can tell them so and move on without taking time to answer a question that will be covered later.

Know the other training materials. Have copies of the manuals and materials referenced in this training guide available for your reference and put them in order so that they are easy to locate.

Stand up when you conduct training. In doing so, you will gain in two ways. First, you will have better control of the class, because you can see each trainee and the signals of frustration (hearing difficulty, doubt, or other problem) that a trainee's face may reflect. Second, your voice will carry better with less effort on your part.

Maintain eye contact with your trainees. Look up from your reading whenever you reach the end of an important topic and at the end of each paragraph. Look at the trainees' expressions. If someone looks confused or troubled, stop to ask if anyone has a question. Make a mental note to watch persons who look confused during exercises to see if their performance during the exercises demonstrates an understanding of the material. As you gain experience, you will master keeping eye contact while reading. When you look up, be sure to keep your place by using your finger or a pencil to point at where you left off.

Guard against distracting habits. These include jingling coins, twirling a pencil, etc. You do not need to remain completely still, but remember that you want your trainees to pay attention to what you are saying, not what you are doing.

Speak clearly and convincingly. Make sure everyone in the room can hear you without difficulty. Read at a normal rate of speed. Reading too quickly or slowly will lose the attention of the class.

Vary your tone of voice. If your tone of voice is too level, trainees will have a hard time staying focused on what you are saying. Identify the key words in each sentence and try to emphasize them when reading. For example, in the following sentence:

Keep your Key Informant's Manual with you at all times when working in the field.

The words in boldface could be emphasized to underline the meaning of the sentence:

*Keep your **Key Informant's Manual** with you at **all** times, when working in the field.*

If you do not know an answer, admit it. Do not fumble around for an answer or, still worse, give the wrong one. Never bluff. Look up the answer with the help of the class. If the question is not covered in your materials, tell the class that you will give them the answer after you speak to your supervisor. Then be sure that you do.

Read the manual exactly as it is written. Do not omit anything unless you are instructed to do so by your field office manager (FOM). This ensures that all trainees throughout the country will receive the same training.

Limit discussions. Class participation is a key to effective training, but it must be used wisely. Do not let the trainees' eagerness throw the session too far off schedule. The following techniques will help you to control the class without destroying the trainees' willingness to participate in class discussions:

- ✘ If a trainee asks a question about a point covered later in the guide, tell him or her to hold the question since you will be covering it later. Sometimes you should ask the trainee to make a note and hold a question even if you don't know if it's covered later. If the question is not covered, go back to it at the end of training and try to find the answer in the training materials or get the answer from your supervisor.
- ✘ If a discussion gets out of hand, interrupt the discussion. Tell the trainees that you must end the discussion because there is still a lot of material to cover and continue with the guide. If a trainee persists in pursuing a point, ask him or her to see you during a break, lunch, or after class. Remember that you are working on a schedule. You must make every effort to complete the training in the time allotted.

Do not call on the eager trainees all the time. Try to bring your more reserved trainees into discussions, to see if they are following the material. Some people do not speak in class because they are shy, while others may not speak up because they do not understand the material. It is your job to try and draw out those who do not understand so that you can clarify the topics that are confusing them.

Encourage the trainees to learn. Acknowledge incorrect answers by being tactful. Do not embarrass a trainee, but try to lead him or her to the correct answer. Repeat whatever part of the answer is correct to be supportive and try to rephrase the question to give hints. Sometimes, calling directly on a person who looks confused may cause them embarrassment and they may deny that there is any problem. It is often better to try and speak to trainees individually during breaks or during exercises.

Guidelines for calling on trainees — It can be very difficult for people to stay focused when sitting in a room and listening to one person for several hours. This type of instruction-only exchange also does not allow the trainer to gauge whether the trainees are following the instruction or understanding the material presented.

In order to keep the trainees' attention and reinforce the instruction, it is recommended that you call on trainees and ask a question related to each topic after it has been presented. Be sure to call on trainees by name and try not to call on the same trainees. Often a trainee will not speak up if he or she does not understand a topic, for fear of ridicule. Therefore, try to call on each trainee during the training.

Use the APC method of asking questions: **A**sk, **P**ause, **C**all. Ask a question; pause while all the trainees think about the answer; then call on a trainee by name to give his or her answer.

Always acknowledge a correct answer by saying something positive such as, "right," "good," or "okay," etc. If an answer is more than a few words long or is complicated, repeat the correct answer, referencing your materials, after you acknowledge the answer given by the trainee.

If the trainee does not answer correctly, try to lead the trainee to the correct answer by re-asking the question, by asking additional questions, or by referring the trainee to the manual or training materials. Never embarrass him or her by simply saying, "You're wrong."

Remember that the trainees may not always answer exactly as worded in the manual, but the answer should contain the most important information. An answer worded slightly differently than the manual's wording is not incorrect, and you should encourage trainees not to resort to reading answers directly from the manual. Having trainees express concepts in the manual in their own words increases their understanding.

Using the List of Trainees

Use the list of trainees provided by your office during and after class. Use the list of trainees as an attendance sheet during class. Mark the list to indicate which trainees did and did not attend the training each day.

If a trainee is no longer interested in the job, print, "will not attend" next to the name of that trainee, including any reason given for the trainee's departure, and notify your supervisor. Your supervisor may be able to have a replacement trainee hired in time for training. If a replacement trainee is selected at the beginning of training, add the name of the replacement trainee to the bottom of your list.

At the end of training, forward to the central office the list of trainees and attendance record, along with what supervisory area was given to each trainee.

Training Materials

You must obtain all training and supply items listed on these pages for you and your trainees, as prearranged with the central office. Materials provided to trainers **PRIOR TO FIRST TRAINING** include:

- ✘ **SAVVY *Key Informant's Training Guide*** (this publication)
- ✘ **SAVVY *Key Informant's Manual*** for each trainee (bring your copy with you to every training session for reference)
- ✘ current **census listing books** and **AA maps** for key informants to use during fieldwork
- ✘ **appendices** to the *Key Informant's Manual*, at least one for each trainee
- ✘ **SAVVY tote-bag** for each trainee (to carry all materials in the field)
- ✘ **mortality registers** for key informants to use after completing training
- ✘ **notebooks** (at least one for each trainee)
- ✘ **pencils and pens** (at least one for each trainee)

Materials useful for conducting training, if available, include:

- ✘ name cards
- ✘ black markers
- ✘ yellow highlighter
- ✘ flip chart, large paper, or blackboard and appropriate writing instruments
- ✘ letter to thank donor for space

Materials distributed to trainers also include:

- ✘ list of trainees
- ✘ official key informant's identification card (one for each trainee)
- ✘ additional instructions and information from your office, as needed

Using the materials in class — Put a *SAVVY Key Informant's Manual*, notebook, and pen or pencil at each trainee's place at the training site prior to his or her arrival. Use this training guide to ensure that you are covering all the topics in the manual. Read the manual sections indicated aloud to the class, or ask for a trainee volunteer to read selected sections. After some sections, the training guide will list notes for you to follow. Be sure and follow all notes in the training guide.

You may receive some basic administrative paperwork that must be completed at the beginning of training. Either you or an administrative officer will administer this paperwork once the trainees have arrived, brief introductions have been made, and attendance has been taken.

You will receive additional instructions and information from your office. These include:

- ✘ trainees' employee identification codes, contact information, and maps of the SAVVY verbal autopsy supervisory areas (you will provide trainees with this information at the end of the training session), and;
- ✘ the SAVVY office may provide other information during training either in the form of additional materials, or written or verbal instructions.

You will pass out identification cards at the beginning of the training session. If there are more trainees than identification cards, you will need to obtain more cards from the central office. If you have more cards than trainees, return the excess cards to the central office at the end of training.

You will receive an assignment for each trainee that you will hand out upon the successful completion of training. These assignments include the trainee's specific assignment area maps and materials listed in the *Key Informant's Manual*, as needed for the interview process. You may need to make some choices about which KIs to retain if you have more successful trainees than assignments.

TRAINING OUTLINE (BEGINNING OF CLASSROOM TRAINING)

Welcome trainees and ask them to sign their names next to their printed name in your notebook. If you have name cards, ask the trainees to write their names on the cards and use them.

When everyone has arrived, introduce yourself and explain that this training is for SAVVY key informants. Inform trainees how many days the training will last and be sure that no one is at the wrong training center.

Ask trainees to introduce themselves one by one.

Inform trainees of the following point:

- ☒ daily start time of training
- ☒ morning break time and duration
- ☒ lunch break time and duration
- ☒ dining arrangements available
- ☒ afternoon break and duration
- ☒ daily training ending time

Ask trainees to please respect the following rules:

- ☒ required attendance every day of training
- ☒ be at the training center before the starting time each day, and return promptly from breaks
- ☒ cell phones should be turned off during training
- ☒ no smoking or eating during training sessions

Ask trainees to open their *Key Informant's Manual* to the table of contents. Inform them that you will be covering each of these chapters during the training session.

Ask the trainees to turn to the beginning of chapter 1.

CHAPTER 1 OF THE KEY INFORMANT'S MANUAL: WHAT IS SAVVY?

Explain that chapter 1 provides a general overview of the SAVVY system. Details about the trainees' specific roles in the SAVVY system will become clear during training.

Take 10 minutes and have the class read chapter 1.

Stop and ask if there are any questions.

Questions for the class — Ask the following:

- ☒ Briefly, how would you explain SAVVY and its activities to a person who has just moved into your assignment area?
- ☒ Why is community participation important to SAVVY?

CHAPTER 2 OF THE KEY INFORMANT'S MANUAL: ROLES AND RESPONSIBILITIES OF THE SAVVY KEY INFORMANT

This chapter provides an overview of the general roles and responsibilities of the key informant. A detailed description of specific responsibilities of a key informant is included in the *Key Informant's Manual*. In addition to this training guide, trainers must refer to the manual at all times during training session.

Take 20 minutes for the trainees to go through the bulleted points in the chapter. Stop and ask if there are any questions.

Questions for the class — Ask the following:

- ✘ Name the roles that KIs play in a SAVVY system.
- ✘ Before visiting a household, what important things should you, as the KI, do/be aware of/be equipped with?
- ✘ Who do you consult with or what document do you refer to when you are uncertain about the SAVVY residential status of a deceased?

CHAPTER 3 OF THE KEY INFORMANT'S MANUAL: KEY INFORMANT MATERIALS

Go through the list of materials that each key informant is required to have — hold them up as you introduce each item. These materials should be at each trainee's seat during training.

- ✘ Emphasize that these materials should be kept with the KI whenever he/she is in the field performing SAVVY duties.
- ✘ Be certain that everyone has a KI identification card, and that the information is correct.

Stop and ask if there are any questions.

Questions for the class — Ask the following:

- ✘ Why do you need the address listing book from a SAVVY census?
- ✘ How do you find out the boundaries of the area that you are going to cover?
- ✘ To whom and when do you give the medical information envelop?

CHAPTER 4 OF THE KEY INFORMANT’S MANUAL: DEFINITIONS AND RULES

This section clarifies two very important definitions within the SAVVY system: the definition of a “resident” for VA purposes; and the definition of a “respondent” for the VA interviews.

Take 15 minutes for the trainees to read this chapter to ensure they understand the meaning of these terms “resident” and “respondent.”

Stop and ask if there are any questions.

Questions for the class — Ask the following:

- ☒ Explain what is meant by a “resident.” Can you give two examples each of people who are not reported in the VA system and those who are included?
- ☒ Should you report a death to the verbal autopsy interviewer (VAI) even when you are uncertain about the deceased’s residential status in SAVVY?
- ☒ Who ultimately decides whether a VA should be administered in case of questionable residential status?
- ☒ Which people are eligible for becoming VA respondents?

CHAPTER 5 OF THE KEY INFORMANT'S MANUAL: HOW TO ENSURE MORTALITY REPORTING IN THE COMMUNITY

This chapter highlights the importance for key informants to be able to report all mortality in the community and provides several ways key informants can do that. One suggestion is that KIs establish a network of contacts with people who are most likely to know about deaths in the area. It also emphasizes the importance of having positive and sensible attitude when visiting the family of the deceased. Take 15 minutes for the class to skim the chapter.

Stop and ask if there are any questions.

Questions for the class — Ask the following:

- ✘ Ask the participants to respond to some of the questions under the “Use a Positive Approach” section, but to use their own words.
- ✘ What can you do to convince a family of the deceased to participate in a VA interview?
- ✘ Why is community participation important to SAVVY?

CHAPTER 6 OF THE KEY INFORMANT'S MANUAL: HOW TO VISIT HOUSEHOLDS OF THE DECEASED

This chapter describes a visit of a KI to the family of the deceased. The purpose of the visit is to collect information on the particulars of deceased by asking family members about the deceased person's age and sex, and to obtain other household identification so that the VA interviewer can easily identify the household when he or she visits to conduct VA interview. It is important that key informants carefully follow the guidelines and procedures outlined in the *Key Informant's Manual*, to ensure that all deaths occurring in the SAVVY areas are correctly identified and registered.

Spend 15 minutes for the participants to read the chapter.

Stop and ask if there are any questions.

Questions for the class — Ask the following:

- ✘ You are expected to introduce yourself when you visit the households. Why is this necessary?
- ✘ Name three important things to mention during your introduction.

CHAPTER 7 OF THE KEY INFORMANT'S MANUAL: HOW TO COMPLETE THE MORTALITY REGISTER

Chapter 7 of the manual introduces the mortality register and provides instructions on how to use it. Ask the class to turn to the sample mortality register, which can be found at Appendix A in the manual. Give the trainees 15 minutes to look over the mortality register and study the instructions, followed by an exercise where participants work in pairs to complete the form for an imaginary death.

Stop and ask if there are any questions.

Questions for the class — Ask the following:

- ✘ Why do we record deaths in mortality registers?
- ✘ What information should be recorded in the mortality register?
- ✘ In case the household where the death occurs moved in your assigned area after the SAVVY census, how do you record their information in the mortality register?
- ✘ In the absence of the respondent's knowledge of age of the deceased, how would you find out the deceased age to write in the mortality register?

CHAPTER 8 OF THE KEY INFORMANT'S MANUAL: HOW TO VERIFY THE BOUNDARIES OF THE ASSIGNMENT AREA

This section of the manual introduces participants to the AA map created by the census interview. Ask the trainees to turn to the map provided in the training materials package. Emphasize that before starting the work, it is important for KIs to verify the boundaries and become familiar with their AA.

Stop and ask if trainees have any questions about the map.

CHAPTER 9 OF THE KEY INFORMANT'S MANUAL: SUPERVISOR SUPPORT FOR YOUR WORK

Have the class read the chapter for 10 minutes.

Stop and ask if there are any questions.

Questions for the class — Ask the following:

Whose record is your mortality register being compared with?

TRAINING PROGRAM AND TIMETABLE

The training program and timetable will help you organize your training. If you need more time to deal with a particular subject, you should plan for it to make sure that key informants understand their work. Typically, the training takes two days. Subsequent re-training should take about a day. Two-day training for new key informants typically involves classroom work the first day and fieldwork practice for half a day of the second day.

A typical training day would begin around 8 AM and end at about 5 PM. Below is a typical two-day training program for newly recruited key informants.

Day One

Registration of participants, introductions and opening of the training session

Introduction to SAVVY and objectives of the system

Introduction to and definitions of **important concepts** used in mortality reporting system:

- ☒ Who is a resident?
- ☒ What is a household?
- ☒ Why do we have to report all deaths in the sample area?
- ☒ What is verbal autopsy and why do we implement it?
- ☒ What is a mortality Register and who fills in the register?

Morning Break

Go through the **manual and the mortality register**: Explain roles and responsibilities of a key informant

Explain how to **conduct an interview** and fill in the mortality register

Question and answer session

Lunch Break

Drama Session 1: Trainers or supervisors demonstrate how to conduct interviews and fill in the mortality register

Feedback and comments from the demonstration

How to respond to **unusual situations** during fieldwork – such as a respondent refusing to cooperate, etc.

Afternoon Break

Drama Session 2: Trainees practice and participate among themselves in conducting interviews and filling in information in a mortality register

Feedback and comments from the trainees drama performance

Evaluation of the day's training

Day Two

Highlights of the previous day are given by a selected volunteer

Division of groups for fieldwork training

Fieldwork exercise

Lunch Break

Feedback from field work exercise by each group

Assessment of the field performance, as observed by trainers and supervisors

Question and answer sessions and additional drama session, if needed

Distribution of mortality registers and other materials and equipment to trainees

Administrative and logistic issues

MEASURE Evaluation
Carolina Population Center
University of North Carolina at Chapel Hill
CB 8120, 123 W. Franklin St.
Chapel Hill, NC 27516 USA
www.cpc.unc.edu/measure

International Programs Center
Population Division
U.S. Census Bureau
Washington, DC 20233
www.census.gov

MS-07-26-KI-TG



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Helping You Make Informed Decisions