The meta-PEN – sharing and disseminating methodological experiences

Jens Friis Lund
The PEN methodology....

....is ‘state of the art’ but what happens when it meets reality?

How to assure that we get the best possible data?

**Methodological experiences**
- Issues relevant to data **reliability** and **validity**
- This presentation is based on a draft methodological paper developed over the fall 2007 and reporting experiences from studies in five countries:
  - Nepal: Lila Puri, Santosh Rayamajhi, Bir Bahadur Khanal Chhetri, and Helle Overgaard Larsen
  - Bolivia: Patricia Uberhuaga
  - Mozambique: Øystein Juul Nielsen
  - Guatemala: Jóse Pablo Prado Córdova
  - Tanzania: Jens Friis Lund
The aim is to improve on our methods....

....and the way we put them into use.

Hence, the focus is on both:
- Methodological aspects
- The practicalities of implementation
The PEN’ers are coming!
Criteria for selection of research sites and communities

- Purpose of research
  - Variation and generalisation
- Project vs. non-project site
- Remote vs. peri-urban site
- Migration patterns
- Prior experience and contacts
- Local political climate
- Local acceptance
Approaching communities

- First impressions matter
- Negotiating terms
- Openness and information
- Support from local authorities
- Handling local politics
Setting the research team

- Enumerators and research assistants
- Outsiders vs. local enumerators
- Employment conditions
- Team spirit and motivation
Pre-survey field work

- Seasonal calendar
- Local map
- Gaining local knowledge
- Random sampling
- Testing questionnaire
- Training enumerators
The survey

- Interview vs. survey approach
- Who to interview?
- Sensitive issues
- Recollection periods
- What's important?
Extra-survey work

- Unit standardisation
- Price survey
- Checking recorded information
  - During survey rounds
  - Between survey rounds
- Avoiding household attrition
- Dealing with ‘difficult’ households
Future developments

- Gathering experiences from individual PEN partners that have done methodological tests
  - Testing for bias of probing thoroughly for use of medicinal plants in Tanzania
  - Testing for differences in results between one and three months recollection periods in Nepal
  - Others?

- Eliciting the experiences of PEN partners in a structured manner
  - A questionnaire to be distributed to all PEN partners