

FinScope in Tanzania

The FSDT Tanzania Experience

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Key Issues for FinScope in Tanzania

- FinScope is the top priority project for FSDT
- A great deal of credibility rides on the successful outcome =>
- Drives the decisions we take and the way we take them!

Key Issues (cont)

- FinScope engages a wide range of stakeholders (Stakeholder Task Force) with the aims of:
 - Insuring stakeholders' understanding of key issues such as sampling, questionnaire design and project management =>
 - Securing “buy in” to maximise the chances of stakeholders actively using FinScope data & analysis
 - Creating knowledge sharing and learning at local level to feed back into subsequent surveys.

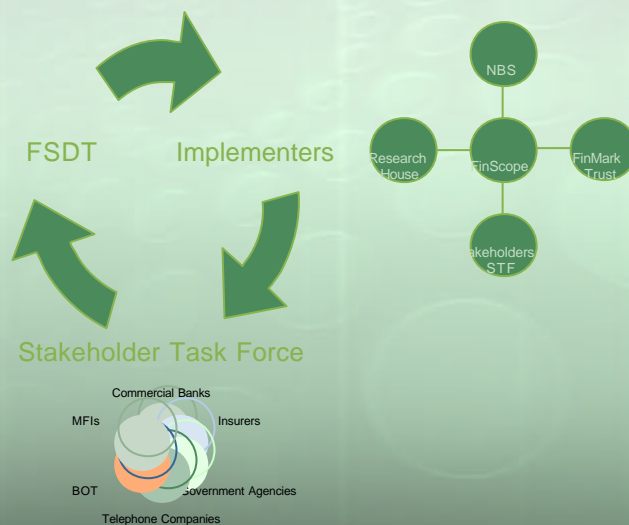
Key Issues (cont)

- We won't get it right first time, but...
- FinScope in Tanzania should be:
 - As well thought through as possible
 - Provide data and analysis in which stakeholders have confidence and will thus use
- For these reasons FSDT
 - Employed a Project Coordinator
 - Time is not the essence; getting it “right” is

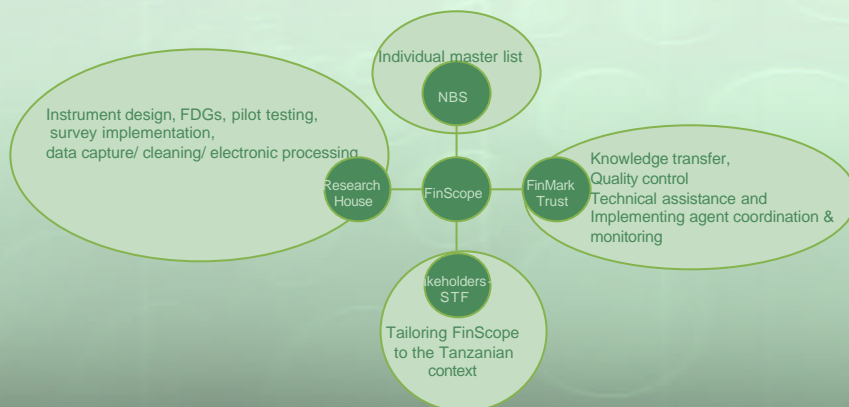
FinScope Survey Status

- Awareness creation and information for a broad range of stakeholders
- Establishment of the Stakeholder Task Force and the 'd-group' webpage.
- Institutional arrangements for the FinScope implementing agents

Institutional Arrangements



Roles of FinScope Implementing Agents



FinScope Survey Status

- Questionnaire design and development
- Sample design and drawing up of master list of individuals in selected households
- Project management and coordination of implementing agents
- Quality control of deployed survey techniques
 - Focus Group Discussion
 - Recruitment and training of moderators (FDGs) and enumerators
 - Methodology for drawing up a individual master list

Time Line for the Survey

- Focus groups & pilot survey – March/ April
- Drawing up master list – April
- Finalise questionnaire – early May
- Field work – mid May
- Data entry/ cleaning - July
- Segmentation & modelling - August
- Dissemination - September

Lessons Learned to Date

- FinScope initially can be difficult for stakeholders to grasp fully
 - Methodology and terminology ‘translated’ and presented in a ‘digestible’ way to stakeholders, who come from different disciplines and are of different educational backgrounds
 - At concept and planning stage it is difficult immediately to grasp the merits of FinScope
 - Case studies are good to demonstrate how it can be done, but insufficient to explain the underlying concepts behinds FinScope. Takes time and clear explanation, e.g. of core & psychographic questions

Lessons Learned (cont)

- Difficult to keep stakeholders involvement and commitment consistent
- Keep stakeholders informed, consult but expect only limited proactive involvement
- Don't involve everybody in everything: discuss only the sections of the questionnaire of interest to particular stakeholder groups

Lessons Learned (cont)

- Who is doing what? Select the right partner for the right tasks, e.g. division of tasks between Steadmans & NBS
- Tasks may be redefined in the course of the process, therefore contracts either agreed later &/ or kept flexible
- Survey techniques may need to be adjusted
- Local testing and probing of critical issues are worthwhile to complement experiences elsewhere

Lessons Learned (cont)

- Working materials provide for process documentation - at times requires complementary documentation
- Stakeholders represent potential users of survey data, not the individuals interviewed
- The individual consumer not necessarily represented as a stakeholder =>
- Of utmost importance to deploy methodologies and tools that assess their perception and understanding.

Recommendations – for FMT

- Development of FinScope methodologies in the form of a course for implementing agents, sponsors and possibly stakeholders covering
 - Underlying concepts
 - Planning and design stage
 - Logical process flow and issues to be considered at all stages
 - Demonstration of applied knowledge by case studies
 - Tools and methodologies of probing and testing
 - Operational issues
 - Technical issues to be considered and decided upon during the entire process.
 - Problem-solving strategies

Recommendations – for Implementing Agents

- The applied methodology is only as good as it suits and serves the objective of the survey
 - Nobody ‘runs the show’ on their own: FinScope is a collaborative effort – major efforts in coordination and flexibility
 - During the process tasks may be refined. May have implications for working plans and budgets
 - Take into account different levels of understanding, while dealing with other agents and stakeholders
 - Strive for as much communication and knowledge sharing as possible. Ensure transparency of processes