

STUDY GUIDE

Migrant Integration Measurement Tool

Implemented by the IOM Joint Global Initiative on Diversity, Inclusion and Social Cohesion (DISC) and IOM Brazil, in collaboration with the Immigration Policy Lab (IPL) at ETH Zurich



Please note that this study guide may need to be adapted depending on local contexts.

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1. Introduction of the Study Guide

The *Study Guide* provides specific instructions on methodological procedures associated with using the IPL/IOM Migrant Integration Index questionnaire. The guide has been developed to help ensure methodological consistency.

This guide is intended for use by mission team members, interviewers, data entry team and other individuals responsible for key aspects of the study.

Context

The Immigration Policy Lab (IPL) / International Organization for Migration (IOM) Migrant Integration Index is a survey-based measure of immigrant integration. It is based on a multi-dimensional understanding of integration, which considers the following aspects: psychological, navigational, economic, social, linguistic, and political. The survey was developed based on the IPL Integration Index and adapted to the Brazilian context through a series of internal discussions and tests –including a **pre-pilot** test – conducted by IOM Brazil. It will be tested again through the pilot before its application for the data collection. The index is applicable to all adult migrant groups.

The results of the survey are measured as an index; the questions have clear directionality such that higher values obtained by respondents signal higher levels of integration.

Because the Index is a standardized survey which has been extensively and empirically tested, it is possible, to a certain extent, to compare and contrast the results with previous findings from past applications across countries and regions.

This study targets IOM beneficiaries of Cash-Based Interventions (CBI) in Brazil. The CBI programme targeted vulnerable groups of migrants and refugees that were hit by COVID-19 outbreak. For more information about the project, please click [here](#).

The survey will consist of a pilot test and following data collection stage. Both activities will be conducted by one or more external survey firms.

The surveys will be conducted by phone, and the answers will be entered into the software *Qualtrics* by the enumerators for registration and analysis.

Objectives

The objective of the survey is to understand and capture the multidimensional integration outcomes and experience of migrants in Brazil.

It also aims to adapt and standardize the IPL Index for conducting these types of surveys in other contexts.

Based on the findings of the survey and scores of the respondents, the study will also help inform and tailor future programming, better target future beneficiaries, and influence broader policy considerations.

Study Partners

The partners for the study include:

- International Organization for Migration, HQ
- International Organization for Migration, Country Office Brazil
- Immigration Policy Lab (IPL) at ETH Zurich

2. Ethical Obligations

The general ethical and safety obligations to be adhered to throughout this study are outlined in detail in the **IOM Data Protection Manual**. If partners need to obtain copies please see the web page:

<https://publications.iom.int/books/iom-data-protection-manual>

The following is a brief overview of the basic principles to be respected and followed by interviewers and other research team members:

1. **LAWFUL AND FAIR COLLECTION:** Personal data must be obtained by lawful and fair means with the knowledge or consent of the data subject
2. **SPECIFIED AND LEGITIMATE PURPOSE:** The purpose(s) for which personal data are collected and processed should be specified and legitimate, and should be known to the data subject at the time of collection. Personal data should only be used for the specified purpose(s), unless the data subject consents to further use or if such use is compatible with the original specified purpose(s).
3. **DATA QUALITY:** Personal data sought and obtained should be adequate, relevant and not excessive in relation to the specified purpose(s) of data collection and data processing. Data controllers should take all reasonable steps to ensure that personal data are accurate and up to date.
4. **CONSENT:** Consent must be obtained at the time of collection or as soon as it is reasonably practical thereafter, and the condition and legal capacity of certain vulnerable groups and individuals should always be taken into account. If exceptional circumstances hinder the achievement of consent, the data controller should, at a minimum, ensure that the data subject has sufficient knowledge to understand and appreciate the specified purpose(s) for which personal data are collected and processed.
5. **TRANSFER TO THIRD PARTIES:** Personal data should only be transferred to third parties with the explicit consent of the data subject, for a specified purpose, and under the guarantee of

adequate safeguards to protect the confidentiality of personal data and to ensure that the rights and interests of the data subject are respected. These three conditions of transfer should be guaranteed in writing.

6. **CONFIDENTIALITY:** Confidentiality of personal data must be respected and applied at all stages of data collection and data processing, and should be guaranteed in writing. All IOM staff and individuals representing third parties, who are authorized to access and process personal data, are bound by confidentiality
7. **ACCESS AND TRANSPARENCY:** Data subjects should be given an opportunity to verify their personal data, and should be provided with access insofar as it does not frustrate the specified purpose(s) for which personal data are collected and processed. Data controllers should ensure a general policy of openness towards the data subject about developments, practices and policies with respect to personal data.
8. **DATA SECURITY:** Personal data must be kept secure, both technically and organizationally, and should be protected by reasonable and appropriate measures against unauthorized modification, tampering, unlawful destruction, accidental loss, improper disclosure or undue transfer. The safeguard measures outlined in relevant IOM policies and guidelines shall apply to the collection and processing of personal data.
9. **RETENTION OF PERSONAL DATA:** Personal data should be kept for as long as is necessary, and should be destroyed or rendered anonymous as soon as the specified purpose(s) of data collection and data processing have been fulfilled. It may however, be retained for an additional specified period, if required, for the benefit of the data subject.

Ethical considerations:

- Respect the privacy and dignity of data subjects.
- Ensure safety and non-discrimination.
- Protect confidentiality of personal data.
- Prevent unauthorized disclosure and inappropriate use of personal data.

Data security

One fundamental aspect of our research lies in the respect to the ethical principle of confidentiality. In the informed consent, we guarantee to the interviewee that all the information he/she provides is going to be kept anonymous.

Data will be anonymised in all reports and outputs, and aggregated such as no respondent is individually identifiable. All data will be stored on secure server and handled carefully. IOM and IPL have signed a local cooperation agreement that includes a [data sharing provision](#) to ensure data security and confidentiality.

Distress during the interview

The participant's well-being is always the priority. Participants' requests to stop or take a break from the interview should always be respected.

If a respondent explicitly requests to be referred (i.e. he/she wants his/her case to be sent and shared with the relevant service provider) as in the case above, please write down the respondent's details (ID, first name and contact information) and make a note of the referral need.

After obtaining the necessary details and depending on the case, the enumerators or assigned person at the survey company will make the referral to the relevant staff/organization/service provider for proper case management and assistance based on the enumerators referral guide.

In very specific cases that are not included in the referral guide the survey company can refer to IOM Brazil.

The overview of referrals during the data collection will be passed to IOM mission in Brazil at the end of the Contract.

3. Implementation of the survey

Study Participation Criteria

To qualify to participate in the study, the respondents should be:

- Migrants residing in Brazil
- Haitian and Venezuelan nationals
- Beneficiaries of the CBI programme of the IOM mission in Brazil
- Over 18 years old
- Participation must be voluntary and on the basis of informed consent

IOM Brazil's CBI database contains roughly **2,700 migrants with contact numbers**

The breakdown of migrant beneficiaries with contact numbers are below:

Beneficiaries in the database by nationality	
Total number of contacts (with phone number)	
Venezuelans	Haitians
1,889	756
Gender (of contacts with phone number)	
Venezuelans	Haitians
Female: 1,468 Male: 411 Other: 10	Female: 612 Male: 142 Other: 2

Target Respondents

- Pilot testing: 33 Haitians migrants and 67 Venezuelan migrants. (Samples will be treated separately by nationality, in order to test the questionnaire in French before the actual survey.)
- Actual survey: 700-800 migrants. This may be increased if the (1) pilot testing garners high response rates, (2) IOM Brazil will have more access to larger migrants' database and (3) there is enough budget for conducting more surveys.

Sampling Strategy

Sampling Strategy and Sampling Frame:

Building a representative sample is not feasible in this context. Therefore, interviewing migrants who are IOM beneficiaries can only give us a general idea of the integration levels of this population.

By means of drawing a random sample of the sampling frame, the study aims to get representative data from the population of CBI beneficiaries included in the IOM Brazil's CBI database described in the above table.

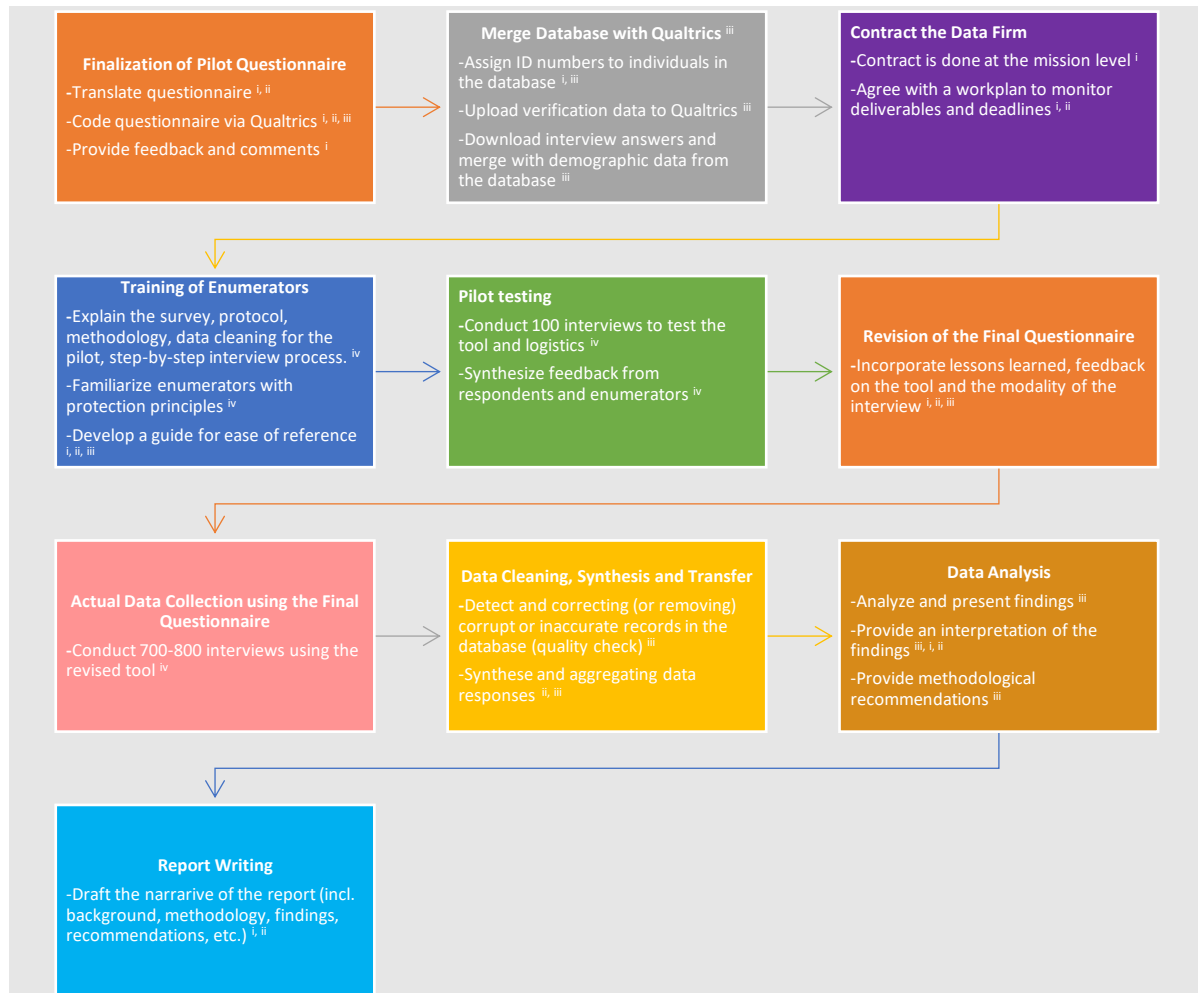
Following the random sample, enumerators will contact respondents from the database until they reach the target number of the pilot or actual data collection. Enumerators will try to contact each respondent four times at different hours in case they do not answer at first.

Sample Size:

- For the pilot testing, the aim will be to complete 67 interviews with Venezuelans and 33 interviews with Haitians.
- For the actual data collection, the aim is to ideally reach 700 – 800 completed interviews for the results to be statistically significant.

Overview of the Workflow

Please refer to below sections for more detailed information on this what each workflow would entail.



Responsible partner:

i: IOM Brazil

ii: IOM HQ

iii: IPL

iv: Survey company

Finalization of the Pilot Questionnaire

The questionnaire was finalized with the input of the Brazil mission, IOM HQ and the guidance of IPL. The questionnaire was translated into Spanish and French by IOM HQ and the mission, and coded in Qualtrics by IPL (Spanish and English) and IOM (French) based on the questionnaire already coded on Qualtrics by IPL.

Merging Database with Qualtrics – Data workflow

1. IDs and sampling frame:
 - a. if the IDs contained in the CBI database are unique and do not contain any personal information, IOM will send a file containing 2 columns: one with the beneficiaries' IDs and one with their language (so that we can make sure to include French speakers in the pilot sample) and IPL will draw a random sample out of this.
 - b. All individuals registered in the CBI database will be assigned a random ID number by IPL and be included in the random sample.
 - c. IPL will share the random sample with IOM, who will share it with the survey firm. IPL will indicate in which order respondents should be interviewed and the survey firm will follow the assigned order.
2. After the amendment to the cooperation agreement has been signed, IPL will receive from IOM a first dataset (dataset #1) that includes 3 columns: participant ID, first name and age.
 - a. this dataset needs to be shared before the data collection starts (i.e. before the pilot).
 - b. IPL will upload this data to Qualtrics.
3. The enumerators will use a individual-specific link to enter to the survey in Qualtrics, which will load the age and first name of the respondent. This allows the enumerators to double check the respondent's identity following the questions "*Could you give me your first name please?*" and "*Could you give me your age please?*".
4. IPL will receive a second dataset (dataset #2) with the following columns: participant ID and all other variables included in the IOM Brazil CBI beneficiaries relevant for the report.
 - a. this dataset can be shared prior, during or after data collection but only after the amendment to the cooperation agreement has been signed
5. Once data collection is completed, the survey answers entered on Qualtrics (dataset #3) will then be downloaded for analysis.
6. It is crucial that each of the three datasets contain the participants' ID. This will allow us to merge the datasets. Otherwise, we would need to rely on first names or any other information to identify the respondents and merge the information that correspond to them. Yet, these are rarely entered in the same way, so it is more prone to errors and more time-consuming. Hence the importance of the ID.
7. After the data is downloaded from Qualtrics and saved on ETH (IPL's) server for analysis, it will be deleted from Qualtrics. IOM can save it on its own server before IPL deletes it.

Contracting the Survey Firm and Scope of Work

The mission will contract the survey firm, taking into account that the company will ideally be responsible for the following:

- deployment of enumerators who will administer the survey
 - carry out a training for the enumerators to familiarize them with the process, software (Qualtrics) and survey
 - provide tablets and phones for enumerators and shoulder mobile and internet costs
 - communications, outreach and follow-up with target respondents if there is no answer, ensuring anonymity of respondents and in line with instructions during the training
 - conduct interviews and enter survey answers on Qualtrics (it is important that enumerators get familiarized with the online survey tool, Qualtrics)
 - review all the data gathered to ensure that they are complete and accurate
 - facilitate the distribution of incentives (if needed)
 - Make referrals (if needed) according to the enumerators referral guide that will be provided by IOM Brazil.
 - the survey firm should also discuss with IOM how it can operate in cases of COVID restrictions. For example, can the enumerators work from home in comfortable enough conditions and ensure the safety of the respondent's data? Or should the data collection be postponed to a time where COVID restrictions ease out. The safety of the enumerators and the protection of respondents' data have priority over the timely implementation of the survey
- For the pilot testing, the survey firm will mainly be responsible for the data entry, data cleaning and synthesis of responses and analysis of the open-text answers from the feedback questions to enumerators and respondents.
 - For the actual survey, the survey firm will not be involved in the data cleaning. IPL will be in charge of this, with the support from IOM.
 - The survey firm should directly coordinate and agree with a *workplan* for the pilot testing and actual data collection with the staff of the mission. The missions serve as their direct contact point for any questions and/or concerns.

Training of Enumerators

- The survey firm will organize a training session for its enumerators before the pilot testing and actual data collection. IPL and IOM will attend to answer any questions that may arise during the training and that have not been already addressed in this guide.

- The purpose of the training is to familiarize the enumerators with the process and the questionnaire, help enumerators to answer questions respondents may have, and motivate respondents to give complete and accurate answers.
- This training also aims to ensure that enumerators familiarize themselves with the questionnaire, survey protocols, target respondent, Qualtrics and the devices (phone and tablet) that they will be using to conduct the interviews.
- It is also a good opportunity for enumerators to ask all the questions they may have prior and during the training.
- If necessary, the training will include a short section on how to approach vulnerable populations, or case management/handling referrals in Brazil. This section will be organized by IOM Brazil.

Pilot Testing

- The overall goal of a pilot is to simulate the environment of the actual survey and test not only the content but also the logistics of it. The pilot will identify how well the respondents understand the questions, and if they are able to answer them with ease. The pilot gives an opportunity to change things, improve the questionnaire and optimize the logistics before collecting the actual data.
- There are usually changes made after a pilot. If this is not the case, the data collected during the pilot might be used for the final data analysis.
- The interview during the pilot testing consists of 4 parts: verification of respondent's identity, the IPL/IOM Migrant Integration Index, a set of feedback questions to respondents and a set of feedback questions to enumerators.
- A [template](#) will be provided to the survey firm to synthesize the findings and feedback from the survey.

Revision of the Final Questionnaire

- After the pilot test, all the feedback and responses will be synthesized by the survey firm which also includes aggregating data responses from the open text answers from feedback questions to enumerators and respondents. Based on what is learned during the pilot, changes will be implemented in the questionnaire.
- The project team, in coordination with the data firm (if the same firm is used for the pilot and the data collection) will finalize any pending logistical issues before the actual data collection starts.

Actual Data Collection using the Final Questionnaire

- The enumerators will carry out the survey with the finalized questionnaire, targeting 700-800 completed interviews, contacting the respondents with the ID number assigned to them.
- The final questionnaire does not include any feedback questions, neither for the respondents nor for the enumerators so it will be much shorter than the questionnaire used in the pilot.

Data Cleaning, Synthesis and Transfer

- IPL will download the answers entered on Qualtrics.
- The data analysis team of IPL will detect and correct (or remove) corrupt or inaccurate records in the database (quality check).
- The team will synthesize and aggregate data responses in preparation of the analysis

Data Analysis and Report Writing

- Based on the collected data, IPL will analyze the key findings, and subsequently present these findings in the form of statistics, graphs, charts and tables that capture the overall results of the survey and comparison of different variables.
- IPL will provide an explanation/interpretation for the findings which includes briefly explaining each graph or table, determining why such patterns and trends in the results are there and suggesting some conclusion that can be drawn from the data.
- IPL will finalize the IPL/IOM tool as part of the annex and also provide some methodological considerations and recommendations on the application of the tool in conducting similar studies / surveys in other contexts.
- IOM Brazil and HQ will jointly draft the narrative of the report which includes, inter alia, the background of the paper, summary of the data collected, the methodology of the survey, and synthesis of IPL's input on the key findings, and recommendations (for future data collection, IOM programming and policy considerations), annexes, etc.