

# **PHASE 1: METHODOLOGY:**

## **Implementing the Primary Questionnaire**

Welcome to this overview of the methods used as we implemented our Phase 1 Research. We provide this information so you can better understand how our research was carried out. We hope what we learned will be of use to others who are planning similar research, or learning about research methods. You are free to adapt our survey and accompanying instructions for use in your own research. You will note that our survey has some sections that vary by country. Ethnicity questions listed the main ethnic groups in that specific country and then allowed respondents to write in additional ethnic identities. So the Kenya list is different from the Angola list. Similarly, the main denominations listed in each survey varied somewhat by country based on other information we had about the largest denominations in that country. Any effort to administer a similar survey in another country would need to adjust these listed identities to fit the context.

Before you proceed, you will find it helpful to review the information on our website to get a general overview of the background. <https://www.africaleadershipstudy.org/about/the-africa-leadership-study-team/>. You may also want to carefully read all the material on the “DATA PAGE” where a clear overview of the process is explained. Be sure to open all the “More Buttons.”

It was essential to Tyndale House Foundation that the research process not only produce the desired information, but that it be implemented in a way that furthered the research aspirations, education, and training of the research team. Gatherings for this training took place in each of the three countries to ensure that all involved understood the basic purpose and process. This also ensured consistency, so the data collected could be comparable and evaluated within the same framework of parameters. Participants were reimbursed for time and travel expenses. This document provides the administrative and organizational tools we developed as the group worked together and includes:

1. **A Job Description for the Senior Research Director**
2. **Administrative Instructions for the Senior Research Directors**
3. **A Job Description for the Research Assistants**
4. **Information and Instructions For Africa Leadership Study Research Assistants**

### *1. Job Description for Senior Research Directors*

#### BASIC FUNCTION

Each Senior Research Director is responsible for planning and implementing the research work of the Africa Leadership Study. Each is also responsible for overseeing the training and work of the Research Assistants and the overall administration of the study. The Directors in each focus area of ALS work together to ensure that the study is carried out effectively, legally, prudently, and ethically.

## WORKING RELATIONSHIPS

- The Africa Leadership Study is under the planning oversight of a task force made up of members from around the world. The Senior Research Directors are also members of this task force.
- An Executive Group (made up of Edward Elliott: Chair, Robert Priest: Research Chair, Mary Kleine Yehling: THF Project Chair and Robert Reekie: consultant) manage the day to day activities of all facets of the study, implementing the long-term goals and timeline worked out by the larger task force.
- The Research Chair serves as the point person between the Senior Research Directors and the Executive Group.
- Senior Research Directors in each region, in consultation with the Research Chair, work out the best method for them to manage the study in their region and are expected to meet together regularly and support each other.
- The Executive Group provides oversight, support, and funding for the study and works together closely with each group of Senior Research Directors.
- It is anticipated that periodic conferences will be held for the full task force and the regional groups to evaluate the study, the data gathered, draw conclusions and make plans. An ALS website is also being developed to serve the full group with the global communication necessary.

## SPECIFIC RESPONSIBILITIES

### A. Operational Planning and Structure

1. Prepare Planning Timelines.
2. Ensure clear communication with all SRDs in each region, meeting together regularly.
3. Work with the SRDs in each of the regions of the study, sharing information, insights and conclusions.

### B. Legal and Financial Issues

1. Prepare a Budget.
2. Maintain clear financial transaction records and reports.
3. Ensure that there is a functioning system of controls and reports for all areas of the ALS, including payment and reimbursement of RAs and SRDs.
4. Provide regular financial statements and reports to the Executive Group.
5. Ensure that all research permit and legal requirements are understood and fulfilled.

### C. Research

1. Develop, recommend, and implement policies and procedures in matters related to the research.
2. Interview, select, train and oversee the work of Research Assistants.
3. Handle correspondence, e-mail, and phone calls in such a way as to carry out the business of the ALS in a timely and orderly manner.
4. Provide for consistent and accurate collection and entry of data, protecting the confidentiality we have promised respondents.
5. Work in the larger context of the ALS, together with all regions to evaluate and interpret the data, draw conclusions and propose action.

### D. Decision Making and Leadership

1. Consistently seek God's guidance in fulfillment of responsibilities and examine personal motivation. Pray regularly for each other and for the study.

2. Work and meet regularly with the Executive Group, coming to consensus with them in decision making.
3. Represent the ALS to the larger Christian community and the local community in such a manner as to enhance the reputation and goals of the ALS.
4. An important facet of the work is establishing and nurturing connections, networks and relationships among pastors, Christians in business and other walks of life, across different regions and countries of the continent, across different denominations, both male and female, and from all different walks of life and socio-economic levels.
5. May all be done to give God the glory and serve as a channel for Him to build His Kingdom.

## ***2. Administrative Instructions for the Senior Research Directors***

To be used in conjunction with the ALS Senior Research Director Job Description

We have been operating with the assumption that in each country there will be key senior research directors playing central roles in organizing and coordinating the research of others (of graduate students), and that these key senior researchers are to be remunerated. They were asked to keep a timesheet of their time devoted to the project and were paid accordingly. While it is relatively easy to keep track of major meetings, or other significant blocks of time, there are a variety of other activities that take up repeated and smaller blocks of time. These include such as emails, brief phone calls, etc., and are harder to track. Now that the Pilot Project in Kenya is substantially completed we have evaluated the remuneration process and will work as follows going forward:

### **Monthly Retainer:**

All senior research directors will be given a monthly retainer for their participation and support of the ALS. This may involve a different mix of responsibilities for each, but is intended to cover involvements that do not require sustained time, but which do require attention and responsiveness. It is not necessary to keep a written record of these smaller involvements.

### **Travel and Expense Report:**

We will continue to use the “Travel and Expense Report for Africa Leadership Study” to track travel, meals, lodging and other related expenses for which you need to be reimbursed.

### **Payment Process:**

All requests for funds need to be turned in to your designated Senior Research Director. All disbursements will be approved and signed off on by two people. This provides protection for those responsible for distributing the funds and is a standard accounting practice of checks and balances.

### **Oversight, Management and Planning Responsibilities:**

Refer to the Senior Research Director Job Description. One key responsibility is to guide in choosing where and to whom the survey is administered. Plan a few focus group discussions in regions. For example, in Kenya we have divided the country in 7 regions. We could do at least one focus group in each region. We are likely to get rich data if we use this method together with individuals filling in questionnaires.

### *3. Job Description for Research Assistants*

#### BASIC FUNCTION

The Research Assistant is responsible for implementing the research work of the Africa Leadership Study. The RA is required to participate in the training provided and follow the guidelines for the overall administration of the study. The RA serves as the “face” or representative of the study as they meet the “public” to carry out the research. In all areas the RA strives to see that the study is carried out effectively, legally, prudently, and ethically.

#### WORKING RELATIONSHIPS

- The Africa Leadership Study is under the planning oversight of a task force made up of members from around the world. The Senior Research Directors are also members of this task force.
- An Executive Group (made up of Ed Elliott: Chair, Robert Priest: Research Chair, Mary Kleine Yehling: THF Project Chair and Robert Reekie: consultant) manage the day to day activities of all facets of the study, implementing the long term goals and timeline worked out by the larger task force.
- Senior Research Directors in each region work out the best method for them to manage the study in their region and are expected to meet together regularly and support each other.
- The Executive Group provides oversight, support, and funding for the study and works together closely with each group of Senior Research Directors.
- It is anticipated that periodic conferences will be held for the full task force and the regional groups to evaluate the study, the data gathered, draw conclusions and make plans. An ALS website is also being developed to serve the full group with the global communication necessary.
- Research Assistants are responsible directly to the Senior Research Directors in their region.

#### SPECIFIC RESPONSIBILITIES

##### A. Operational Planning and Structure

1. Ensure clear communication with all SRDs and RAs in each region, meeting together regularly.
2. Work with the SRDs and RAs in each of the regions of the study, sharing information, insights and conclusions.

##### B. Legal and Financial Issues

1. Maintain clear financial transaction records and reports. This includes a record of time spent and expenses for travel, food and lodging.
2. Submit said reports to the SRDs for approval and payment. Provide receipts.

##### C. Research

1. Attend all training and follow up events as provided.
2. Implement policies and procedures in matters related to the research.
3. Work with SRDs to identify target areas and groups for administering the survey.
4. Set up appointments and events. Be fully prepared for same.

5. Handle correspondence, e-mail, and phone calls in such a way as to carry out the business of the ALS in a timely and orderly manner.
6. Provide for consistent and accurate collection and entry of data, protecting the confidentiality we have promised respondents.

**D. Decision Making and Leadership**

1. Consistently seek God's guidance in fulfillment of responsibilities and examine personal motivation. Pray regularly for each other and for the study.
2. Represent the ALS to the larger Christian community and the local community in such a manner as to enhance the reputation and goals of the ALS.
3. An important facet of the work is establishing and nurturing connections, networks and relationships among pastors, Christians in business and other walks of life, across different regions and countries of the continent, across different denominations, both male and female, and from all different walks of life and socio-economic levels.
4. May all be done to give God the glory and serve as a channel for Him to build His Kingdom.

#### ***4. Information and Instructions For Administering the Survey***

*To be used in conjunction with the Research Assistant Job Description*

#### **Welcome to the Africa Leadership Study.**

We are so glad you have joined us. Welcome to this exciting, meaningful and serious journey of helping advance the cause of Christ in Africa. We want you to be prepared for this task well in advance. The benefits and outcomes of the study will be provided to both the African and Western partners of the ALS.

#### **The following ALS purpose statement guides the Leadership Task Force:**

*The purpose of the Africa Leadership Study is to identify strategic opportunities for supporting the development of Christian leaders in Francophone, Anglophone and Lusophone Africa. In conjunction with African Christian leaders, this will be accomplished through these strategic steps:*

- *Assessing what is already being done in terms of leadership development*
- *Identifying opportunities where Western donors can and should be investing their resources for optimal effect*
- *Identifying challenges that will work against effective deployment of resources*
- *Creating a means of following up to assess the effectiveness of resources invested in leadership development*

#### **In cooperation with the ALS Leadership Task Force, the following was developed by the African ALS leadership:**

*The benefits and outcomes of the study will also inform the African Partners of the ALS Project and can serve as a resource for Africans in understanding current patterns, practices and programs of leadership to be used in their visioning and planning for the future, in that context these are the strategic steps:*

- *Providing African churches and market-place leadership with details of effective initiatives as resources they can learn or draw from and in some cases replicate appropriately.*
- *Providing case studies for institutions of higher learning.*

- *Generating data that Governments can use for leadership development and intervention.*
- *Generating literature on leadership.*

You will be doing the very important work of representing your institution(s) who is/are members of the Africa Leadership Study Partners (ALS) and gathering information to be combined with survey results from all across Africa. It will serve both African ministries as you seek to develop a strong network of Christian leaders in all facets of society. It will serve those in the West who seek to support culturally appropriate projects and partnerships for strategic development in Africa.

In each step of your work with ALS please commit it to God, being open for His grace and guidance. If possible pray together with the other RAs, support each other and expect God to do something special.

*“So encourage each other and build each other up...”1 Thess 5:11*

## **Part 1-Administering the Survey**

### **1.1 Getting copies of the survey and gift pens**

You will receive these from your seminary’s ALS coordinator. You will have to sign for all of the questionnaires you receive, as well as for the pens.

Always carry more questionnaires and pens than you need. For example, if you are expecting to gather data from 5 pastors in a particular location, you can take 10 questionnaires and pens. At the end of your data collection, return both the filled out and all unfilled questionnaires and pens to the senior research director. You will again sign to indicate the number of questionnaires and pens you have returned.

### **1.2 Selecting Survey Respondents**

1. The survey is only as accurate as the care you give in selecting a wide variety of respondents who are representative of many walks of life. We want to survey adult respondents who are likely to be knowledgeable about the ways in which Christians are exercising leadership in different arenas of society. We need to survey not only pastors, but also Christians in business and other walks of life. We want to ensure that we have respondents from different regions of the country, from different denominations, both male and female, and from all different walks of life and socio-economic levels. You can review the categories listed as options in the Survey questions 7, 27 and 40 to see the various possibilities.
2. Each research assistant should try to identify individuals or groups of individuals that would be ideal to fill out the survey and that are already meeting together: for example, a group of pastors meeting together, or a group of Christian businessmen meeting with Gideons, adults attending a Bible study or Sunday School Class, or a group of women in leadership.

### **1.3 Arranging appointments**

1. It is key to give people lead time when contacting them. An individual’s schedule may not have free time right away. Thus try to call/sma them now to arrange appointments. If



a group is willing to host, they need time to inform members of the special opportunity and encourage everyone to attend. Some of those you contact may want to ask questions, get information and think about it before agreeing to do it. Use the information in this document. The better they understand what you are doing, the better prepared they will be when you work with them.

2. You will have the privilege of serving to create networks and bring people together who may not have met but have their faith in common. These side benefits of bringing people together and getting them thinking and talking and praying about leadership is a very important benefit. Who knows what God may do?
3. If you interview a group, it is very important for the leader of the group to introduce you, tell a little about you and add their support, encouragement and gratitude for the participants. You will need to have time together with that leader before the meeting to prepare with them.
4. In the group setting you want to be sure to be clear that each individual is to fill the survey out with their own answers. It is not helpful for there to be a discussion and then everyone in the group put the same answers.
5. Prior to data collection, organize for the time and place you will be meeting with the research participants. Be sure to work out any details ahead of time. You will need to be free to speak and administer the survey so you may want someone from the group to help you with any other tasks.

#### **1.4 Steps for Introducing and Administering the Survey**

1. Be courteous to all participants and any other relationship pertaining to this study. At the meeting the research assistant should explain the survey and provide help in filling it out. Remembering that every person is rooted in a specific and yet changing cultural setting, learn how to be courteous for each situation you will encounter. This is especially important as you approach leaders in their cultural domains.
2. The research assistant should explain the survey (information on the first page of this document) and provide help in filling it out. It should be clear that no one has to answer any question that makes them uncomfortable. Explain confidentiality and be sure they know not to sign their names.
3. Be sure you are familiar with the survey questions and feel confident you can answer questions others might have about them. In your training time you will discuss this. It is very important that all RAs outline the parameters and interpret the questions of the survey in the same way. If you give differing information, it will affect the responses people give as their understanding will be different. This affects the comparability of the data results.
4. The questionnaires should ideally be completed by the participant him/herself. You must be available though, to answer any questions he/she might have. If the participant is illiterate you will complete in on behalf of him/her, by reading the questions and filling in his/her answers.
5. Convey a deep sense of gratitude to each research participant verbally at the end of the interview. Hand each participant the pen provided for him or her and not to anyone else.
6. Complete all questions as answered by your interviewee or participant. If the participant completed the questionnaire him/herself, ask permission to quickly check through it to make sure he/she answered all of the questions. This will ensure that we have correct data

which is an absolute goal in data collection. Attention should be paid to denominational as well as every other detail spelled out in the questionnaire.

7. Interesting or helpful discussions may come up in the course of the interview or at any other time in the data collection. It is helpful for you to keep notes for the time when you debrief with your other Research Assistants. When the discussion is unrelated to the issues at hand, creatively steer the conversation back to the issue at hand. You can perhaps resume the discussion when the survey is finished.

### **1.5 Gifting of the Pens**

1. There are pens inscribed with 1 Thess 5:11 “So encourage each other and build each other up...” in the appropriate language. They also include a name of one of the partner institutions. They come with a separate case for each pen. These are intended as a small way of expressing our gratitude for the time and input of each person who fills out a survey and an encouragement for them to continue to pray for each other and for their leaders. It is also meant to remind them that they are being prayed for by the Africa Leadership Study personnel.
2. They should be given to each respondent personally with a welcome, a thank you and a smile. Please DO NOT have them pick them up from a basket or the box. If there is a group, you could meet each person at the door, shake their hand, welcome them and give them the pen. You could hand out the surveys later after explaining them. Use the verse on the pens as a way to open your remarks and have a prayer together.

## **Part 2 - Answering Questions that may be posed by those who take the survey in a consistent way.**

The individuals or organizations you interview will probably have questions regarding the Africa Leadership Study. Here follow a few common ones. You may come up with additional ones. Please add them and discuss together the best way to answer them. It is very important for all researchers to be consistent in the answers they give. You may need to add material as you come up with answers together that fit your cultural context.

- 1- ***Why have you asked me to participate?*** There is much value in getting the wisdom of many people. “One head does not contain all the wisdom.” You are an important representative of your church, your village or town, your ethnic group, your language group and your family. Man or woman, your wisdom, knowledge and experience is an important part of understanding what good leadership in Africa looks like and how it can be developed. As this wisdom from many people is combined and studied, strengths, weaknesses, patterns and people can be identified that can join together to further the Kingdom.
- 2- ***How long will this interview take?*** It may take as much as an hour of your time.
- 3- ***Are you offering payment?*** Because we want to learn from many people, we cannot offer payment, except to offer the gift of a pen that comes with the prayers “Encourage each other and build each other up.” From 1 Thess 5:11
- 4- ***Will the results be published?*** This is a long term project so it will be some time before the results can all be gathered, analyzed and evaluated. Each of the schools that participate will have access to the findings in time and can make them available as they are able.



- 5- *Are my answers private? Will anyone know what information I gave you?* Your name will not be included in any way on the questionnaire. It will indicate only the geographic area where the data was collected. No one will know who answered any of the surveys collected.
- 6- *Is this information being used by the government?* NO! The government is not involved in this project in any way.
- 7- *Who will benefit?* The benefits and outcomes of the study will inform the African Partners of the ALS Project and can serve as a resource for Africans in understanding current patterns, practices and programs of leadership to be used in their visioning and planning for the future. 1-Providing African churches and the market-place leadership with details of effective initiatives as resources they can learn or draw from and in some cases replicate appropriately. 2-Providing case studies for institutions of higher learning. 3-Generating data that Governments can use for leadership development and intervention. 4-Generating literature on leadership.
- 8- *Can I suggest others who might be willing to participate?* That would be very helpful, if we could fit a time to interview them while we are in the area.
- 9- *How else can I help?* You can pray for the project. Perhaps in your family or your Bible study group or your church you can pray for us to have wisdom and discernment in evaluating what we learn and applying it to help build the Kingdom of God for His glory.

### **Part 3 -Reporting and Protecting the Resulting Data**

1. Protect your data. Even in sunny weather, store your data in an inexpensive weather-proof bag. Do not leave it unattended in a hot vehicle or where others can access it. Protect the confidentiality of the material.
2. Keep separate notes on each setting where the research is filled out. This must be recorded in your fieldwork notebook. A separate code number will be assigned to each gathering where the research is carried out.
3. Immediately after the surveys are filled out, manually fill in the final page on the survey (questions 94 – 102). It is very important to do this right away. If you wait, you will forget important details. This information is very important as it is key in organizing and analyzing the data you collect and collating it with the responses from other areas in Africa. In the rare situation where a participant is unable or unwilling to answer a particular question, please take detailed notes of the occurrence at the end of the interview.
4. If there is discussion around a specific question or topic, particularly in a group situation, please note that a discussion occurred and try to capture the essentials of the discussion.

### **Part 4 - Reimbursement**

You will receive three Excel Spreadsheet forms. These forms can be printed and filled in manually, or you can enter the information into the spreadsheet and it will automatically do the math for you.

1. “Travel and Expense Report for Africa Leadership Study”
2. “Timesheet for ALS Research”
3. “Confirmation of Payment Received”

Use #1 to record your expenses while administering the survey. Use #2 to keep track of the hours you spend working, detailing the tasks. Use #3 to confirm the payment you receive.

To receive your reimbursement, you need to submit the questionnaires, your fieldwork report and the expense forms to your Senior Research Director. They will check through all of the questionnaires and documentation. If everything is in order you will receive payment.