1. SSO Description and Overview

JOB TITLE: Social Surveyor Officer
REPORTING TO: Research and Development Officer
GRADE: 6

1.1. SCOPE OF ROLE

The Social Surveyor Officer (SSO) is responsible primarily for collecting data relating to social performance outcomes. The SSO's are expected to conduct field surveys and interview clients in an independent capacity. SSO's must plan and execute trips to gather information to measure clients' satisfaction and to conduct poverty assessments. SSO's will also be required to collect additional social performance data on an ad hoc basis. The product of the SSO work will be in the form of completed surveys and written reports.

In particular, the SSO's carry mainly three core responsibilities: 'Key activities' (conducting Client satisfaction Surveys, Client in business surveys, and Client exit surveys) as well as other arising activities from different projects within the department. SSO's are also responsible for project monitoring such as Thutopele and savings plan quality monitoring.

1.2. PERSONAL ATTRIBUTES

- Commitment to poverty alleviation
- Excellent oral communication skills
- Cultural awareness
- Ability to work in the field under changeable weather conditions and to traverse rural areas using public transportation
- Flexibility and adaptability
- Confidence to work independently for extended periods of time
- Self-motivation and ability to take initiative and work under little supervision
- Commitment to maintaining workplace integrity

1.3. RESPONSIBILITIES/KPA

- Spend full time in the field collecting social survey data, except during SSO Trainings, and other 'in-office' duties.
- Make administrative plans for at least three weeks at a time prioritizing needy areas
- Determine which centres are feasible for SSO data collection using Microsoft Excel Workbooks
- Collect client satisfaction surveys and BE follow ups into a portable database on the day of collection
- Perform additional social performance data collection duties as requested by supervisor, such as PPI's
- Maintain a weekly log to highlight key challenges observed or items to address
- Maintain good relationships with other departments

1.4. GOALS OF AN SSO

- Make clients feel comfortable to speak openly and honestly
- Collect accurate and high quality data to further SEF's understanding of our clients' lives and businesses, and how we can best serve them
- Gather **honest answers and feedback**, NOT just positive feedback
- Work together to improve data collection skills

2. SSO PERFORMANCE STANDARDS

- SSO's will be required to meet monthly and weekly (estimated) performance standards, as below: *These performance standards are subject to regular adjustments*:

Survey	Monthly Standard	Weekly (estimate)
Client Satisfaction Survey (CSS)	80	~20
Clients in Business Survey (CIBS)	45	~12
Client Exit Survey (CES)	28	~7

General Discussion Observation	2	-
Full Centre Meeting Observation (these should take place on Thutopele delivery weeks)	2	-
Thutopele Quality Assessment (TQA)	8	-
Thutopele Anonymous Voting	1 per centre (delivery weeks only)	-
Savings Plan Survey	3 per centre	-

3. SSO TRAINING

Training is essential for ensuring high-quality data and strict adherence to research protocols. Each SSO will be required to undergo an induction training at the commencement of their appointment, as well as a refresher training at the beginning of every year. The refresher training curriculum will outline the following:

1. Data collection best practices
2. How to interact with respondents: Standardised interviewing and surveying best practices
3. Research methodologies and sampling methods
4. How to build rapport with clients
5. Importance of research ethics and informed consent
6. Back checks and quality control procedures
7. Field protocol

4. PROCEDURE FOR NEW SURVEYS

When new surveys' are introduced by the Social Performance Manager, the following procedures will be followed:

1. Meeting must be set up with all SSO's present, R&D Officer as well as Social performance manager.
2. Team will be required to review entire survey and questions, ensuring consistent understanding.
3. Inter-reliability checks and activities will be conducted before to ensure high-quality data is subsequently produced.
4. Discussion on progress/issues with regards to new survey to be tabled at bi-weekly SSO meeting.

5. SSO ADMINISTRATION

5.1 Fortnightly SSO MEETING:

There will be scheduled fortnightly meetings between the SSO's, the Research Assistant, as well as the Social Performance manager. The agenda of the meetings will be as follows:

1. Introduction/Announcements
2. SSO Feedback
3. Discussion on issues encountered in the field
4. New surveys
5. Skills building session

5.2 WEEKLY PLAN

- All SSO's are required to draft weekly plans outlining the details of their field activities.
- Weekly plans are intended to expedite field observations; spot-checks and to assist in creating lists for CES and CIBS (when applicable).
- Weekly plans are also intended to assist SSO's in anticipating the week ahead in order to avoid last minute issues regarding centre visits.
- Weekly plans should be sent by Friday at 12pm latest, and should include details on: Branch name; centre code; and the respective DF's name for each day of the week.
- If there are any changes made to plans, SSO's should send an email with the updated information and reason for the change.
- Reasons for change of plans should be when SSO's are unable to reach DF. In this event, SS's should have consulted with the BM as to where the DF's centre meeting is taking place, before changing the weekly plan.

5.3 DATA CAPTURING AND CATCH UP CALLS

- Data must be captured by SSO's immediately during the interview unless they are working on a special project where there is an exception of delayed capturing.
- Data Catch-up calls to be made on Fridays. Catch-up calls cannot be made between Monday-Thursday unless stated by the supervisor.

5.4 WEEKLY REPORTING

- SSO's will be required to submit weekly report updates, as below:

SSO weekly report Template			
	# conducted	#standard	reason for standard not met
CSS		20	
CES		6	
CIBS		8	
Covid 19		13	
Thutopele		3	
Centre meeting key takeaways			
General discussion key takeaways			

5.5 GENERAL COMMUNICATION

- SSO Meetings will be held fortnightly and monthly.
- A Whatsapp group has been created for quick announcements and updates.

5.6 SSO CLIENT PROTECTION

- **Client complaint forms**: all SSOs have access to a client complaint form on their tablet to allow submission of complaints
- Submitted complaints are visible to CCR's; and can remain anonymous

6. GENERAL SURVEY BY SURVEY PROCEDURE

6.1. STANDARD SURVEY INTRO

- Introduce yourself
- Check that you are speaking to the correct person *(phone only)*
- I am coming on behalf of SEF to collect some information about _____
- The information will help us to learn from, and better serve our clients (Build rapport)
- All information is confidential, and has no effect on loans or your relationship with SEF
- Are you willing to participate?
    - Small talk is fine, but avoid personal topics or anything a client may be uncomfortable discussing. If a client presents as uncomfortable, try not to agitate them further.

6.2. Centre meeting and General discussion explanation

- SSO's are required to remain present for the centre general discussions; and report on key takeaways for each discussion in their weekly reports.

6.3. CLIENT SATISFACTION SURVEY (CSS) PROCEDURE

Intent:

- The CSS is aimed at identifying satisfaction levels of our clients with regard to:
  - Our policies
  - Information transfer to clients from SEF staff
  - Ensuring that clients know their rights as stipulated by SEF.

Procedure:

- Conducted during the centre meeting.
- SSO's randomly pick each client per group depending on the attendance and number of groups in the centre.
- During the survey, if a client indicates that they do not have a Client protection card, it is the responsibility of SSO's to ensure that they provide the clients with one.

Use:

- To improve SEF's policies to meet client needs.
- To improve customer service (Product and project development)
- To check if information from the office is reaching clients
- To ensure that clients know their rights and are familiar with SEF loan procedures

- Reporting: monthly

6.4. CLIENTS IN BUSINESS SURVEY (CIBS) PROCEDURE

Intent:

- To monitor client business trends.

Procedure:

- SSO Manager provides list to guide selection of clients, but if attendance is poor then random selection is used.
- SSO's are prohibited from requesting DF's to specifically select clients who are in businesses.
- CIB surveys must be done in person (no telephonic option).

Use: ▪ To examine the effect of loan size on the business value ▪ To determine whether the loan cycle has an effect on business value ▪ Monitoring clients in business; and those not in business ▪ Monitoring repayment and savings behaviour of clients in business and not in business
▪ Reporting: monthly

6.5. CLIENT EXIT SURVEY (CES) PROCEDURE

Intent: • The CES is aimed at understanding the root cause of clients leaving SEF, as well as identifying areas of improvement within the organisation.
Procedure: • Drop out lists are sent to SSO's. • Surveys are conducted either face to face or telephonically. Priority/preference should be given to face to face interviews.
Use: • The CES data is utilised to inform policy changes (focused on mitigating client dropout) • To determine trends or recurring issues which lead to client dropout.
Reporting: monthly

6.6. COVID-19 SURVEY PROCEDURE

Intent: To evaluate and monitor the impact of COVID-19 on our clients lives.
Procedure: ▪ Surveys are conducted either face to face or telephonically. Priority/preference should be given to face to face interviews. ▪ SSO's are provided with branch telephone lists as needed. ▪ Can be conducted parallel with CSS if limited attendance.
Use • To inform policy and procedural changes which better serves our clients during the restrictions. • To provide data for future contingency planning.
- **Reporting: monthly**

7. AUDITING POLICY

- The Quality and Compliance (QC) department will assist R&D with quality control and data validation for some of the surveys collected by SSO's.
- Each month, R&D will provide a list of completed surveys from the previous month and mobile numbers to QC, who will then conduct routine audits on SSO data collected.
- The amount of routine audits to be conducted by QC are (subject to change):
    - 2 Client Satisfaction Surveys (CSS) per SSO per month
    - 2 Client in Business Surveys (CIBS) per SSO per month

8. ADDITIONAL POLICIES

8.1. ACCOMMODATIONS (SLEEP-OUT POLICY)

- The monthly budget for Sleep-out allowances and per-diem combined, is R7400.00 per SSO, and should not exceed this amount.

- If an SSO exceeds the budget, they may not utilise any amount from the preceding or succeeding days (no roll over).
- SSO's must ensure not to share accommodation with Operations staff on the field.
- Travel on weekends: SSO's will be booked for 5 nights only during Thutopele weeks, and will subsequently travel on weekends. For other non-Thutopele weeks, SSO's will be booked for a maximum of 4 days, and limit the amount of travelling on weekends.
- In the event that a booking is facilitated by SEF, and the SSO is claiming the normal per diem there is no need to acknowledge place of stay when on the field.
- In the event that an SSO claims Sleep-out allowance, and the booking is not being facilitated by SEF – SSO's must provide acknowledgement via email, outlining where they will be staying each week.
- This is how SSO acknowledgements should look like on the email body:

"I [name, surname] will be working at [branch name]. I hereby claim sleep out and I confirm that I will be staying at my own arranged accommodation and will not at any point be sharing accommodation with SEF operations staff."

8.2. LEAVE POLICY

- SSO's are restricted from taking leave within Thutopele weeks (i.e. leave cannot coincide with Thutopele days).

8.3. REMOTE/("HARD TO REACH") AREAS

- SSO'S should make use of rental cars (or the R&D car) to cover hard to reach areas whenever possible. Preference is made for the R&D car, unless it is unreasonable to deliver.

8.4. SSO ROTATION POLICY

- As per SEF policies, SSO's can be relocated at any time (both temporarily or permanently).
- SSOs may be required to work in branches outside of their appointed area, or to be responsible for the same branches as another SSO. This may be due to either a quality control measure (overlapping branches), or to assist with specific collection needs at other branches.