



## **JOINT AGREEMENT ON FIELD PROTOCOLS IN THE PERIOD OF HEALTH CRISIS**

(version 8)  
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## **I. INTRODUCTION**

The increasing number of people who had been vaccinated against corona virus and the consistently decreasing number of new covid cases merited a declaration of Alert Level 1 in Metro Manila and many other provinces beginning March 1, 2022.

However, the government reminds the Filipinos that covid remains to be a threat and there is always a possibility of new variant.

We, the Marketing & Opinion Research Society of the Philippines (MORES) and Association of Marketing Research Operations Specialists (AMOS) continue to promote the well-being of all data collectors and our data sources.

MORES and AMOS regularly update the Joint Agreement on Field Protocols amidst the Health Crisis to provide guidelines for all its members and affiliates in the conduct of market research taking into consideration the government's pronouncements and latest issuances on safety measures.

**The succeeding sections are specific guidelines recommended by MORES and AMOS to ensure safety of research stakeholders including but not limited to its staff, clients, and respondents.**

## **II. GENERAL HYGIENE AND PROTECTION PRACTICES**

1. WASH HANDS with soap and water for at least 20 seconds as frequently as possible.
2. Always bring a small bottle of spray ALCOHOL or a sanitizer with at least 70% concentration for frequent hand cleaning and sanitizing. It is a handy alternative if handwashing is not possible. Remember that if your hands are visibly dirty, handwashing is the only option.
3. As much as possible, AVOID SHARING of work-related paraphernalia, tools, and devices with other people.
4. REGULARLY DISINFECT tools/devices used in data collection (i.e., phones, tablets, laptops) using 70% alcohol concentration or appropriate sanitation protocol as recommended by the device manufacturer.

When cleaning devices i.e. phones, tablets, laptops, please follow below guidelines:

- a. Turn-off the device.
  - b. Spray alcohol/sanitation solution to a clean cloth or cotton balls or flat cotton pads. AVOID spills/drips in between the keys.
  - c. DO NOT spray alcohol or water directly on electronic devices.
  - d. Gently wipe the keys, edges and underneath the keyboard. Gently wipe the monitor screen as well.
  - e. Wait for it to dry before using the device.
5. AVOID TOUCHING any part of your face. The germs on your hands can take up residence in your mucous membranes and cause infections like covid-19.
  6. Do not come to work when feeling fatigued, with cough (your immune system is challenged), have fever (you are obviously sick) or any symptoms associated with covid-19. Take a rest and self-monitor for possible worsening of symptoms experienced.
  7. Ideally, but not necessarily (unless required and sponsored by client/employer, take an antigen test (self-kit). If tested positive, report to your local health unit and follow their guidelines.

MORES encourages all member agencies and affiliates to establish mechanisms for regular health monitoring of staff/data collectors such as filling out HEALTH DECLARATION FORMS and CONTACT TRACING PROTOCOLS. This always allows for smooth monitoring of health conditions of field personnel. This system also facilitates contact tracing when needed.

8. Always practice SOCIAL DISTANCING. When talking to a person, observe the “1-meter-distance” rule. Avoid any form of physical contact (i.e. shaking hands, doing a high-5).
9. WEAR A MASK. We highly recommend using surgical/medical grade masks. Replace your surgical/medical grade mask every four hours.

If it is necessary to use cloth masks, use additional filters such as tissue paper or similar material. Ensure that they are clean every time. Change the filter daily or after every sneezing or coughing episode. Dispose properly after use.

10. Always practice the following cough and sneeze etiquette:
  - a. Cover your mouth and nose with tissue.
  - b. Properly dispose of the used tissue; then wash your hands immediately.
  - c. If you do not have tissue, use the inner portion of the elbow to cover the nose and mouth when sneezing or coughing. Do not use your bare hands.
11. When necessary and possible, the research agencies may consider providing transportation assistance to staff to ensure their health is protected.

### **III. FIELD BRIEFING PRACTICES**

1. The briefing room should allow for the required one-meter minimum social distancing. This means chairs/tables should be at least 1 meter apart.
2. If the briefing room has limited occupancy, conduct multiple briefings for small groups. A hybrid briefing is also possible – where some people attend the briefing physically and the others virtually via virtual meeting platforms.
3. Encourage Clients to join the briefing via digital platform c/o research agency/field partner.
4. Ensure that the briefing rooms are properly sanitized including the equipment and furniture before and after use of the facility.
5. Ensure proper display of signages/visual cues and reminders in training rooms/ workplace to practice proper handwashing and other hygiene behaviors among employees.

#### **IV. RECRUITMENT PRACTICES**

Agencies should provide a Health Screening Questionnaire with inquiries on whether the respondent has been in contact with a confirmed or suspected Covid 19 case or there is a covid sufferer at home. Terminate interview with respondents who had a recent, i.e., past 14 days, contact with a confirmed case.

#### **V. FIELDWORK PRACTICES**

##### **A. Spots to Cover**

1. Identify the high risk (high incidence of COVID-19 patients) and locked down barangays and exclude them from generation of spots (based on updated LGU/DOH/IATF declaration or alert level classification).
2. Coordinate with the generated barangays to find out what their requirements surrounding health protocol, to obtain permission for field personnel to cover the area and to ensure safety of the field personnel. Secure a formal letter of approval from said barangays that the field interviewers can show to the respondents so that they will feel comfortable entertaining the interview.

It is important that the field interviewers bring their vaccination card and/or antigen result during fieldwork in case the LGU or the respondent asked for it.

3. Ensure that the random starting point is a good distance away (i.e., one block clockwise) from the barangay health center/DOTS center, hospitals, hotels, schools and buildings that are used as Suspected Isolation Facilities. Similarly, right coverage should be going away from the same establishments.

## **B. House to House Interviews**

1. Field personnel should keep his/her vaccination card and/or antigen handy in case the LGU or the respondent asks to see it.
2. Field personnel should bring around an alcohol bottle for personal use. If possible, regularly wash hands (i.e. before and after an interview).
3. Interviewers must properly always wear a mask during interviews. Respondents should also wear a mask. If they don't have one, we must provide a mask for them for the interview to proceed.
4. Masks should not be removed during the interview.
5. Practice social distance even if wearing protective cover – follow the minimum 1-meter rule. Conduct the interview outdoors or in places with good ventilation.
6. Field personnel should report a “not feel well” condition at least 3 hours before the call time. Anybody that registers at least 38 degrees temp should not be allowed to work. The company may provide a self-test kit to the personnel to check if he or she is positive for covid. Field personnel assigned out-of-town should be provided with self-test kits so that they can easily test themselves for antigen.
7. Suspected covid-positive personnel must give daily updates on his/her situation to the field coordinator/project manager. For conditions that last for more than 3 days, the interviewer shall submit a medical certificate before resuming work.
8. All members should establish mechanisms for regular health monitoring of staff/ data collectors such as filling up of health declaration forms. This always allows for smooth monitoring of health conditions of field personnel. This system also facilitates contact tracing when needed.
9. Should field personnel feel uncomfortable doing fieldwork due to news on community outbreak, he/she must report the news to her immediate supervisor for NEXT STEPS. Do not proceed with fieldwork in said area.

## **C. Central Location Tests**

MORES recommendations complying with all IATF announcements on what is permissible when it comes to research methodologies.

1. If necessary to do CLT, ensure to follow all conditions below:
  - a. Ideally, all staff and respondents should be 100% vaccinated.
  - b. Ideally, require all participants (recruiters, data collectors, respondents, clients visiting the site) to do antigen tests (c/o client).
  - c. Ensure that all persons in the test area (respondents and personnel) do not remove their masks during the interview. Masks can only be taken off to eat and drink. Preferably, no talking when masks are off.
  - d. Maintain health and safety protocol at the Central Location site
    - i. Do not get a CLT center located in a crowded area i.e., will require respondents and staff to walk through alleys or narrow roads to reach the site.
    - ii. Select a CLT site with hand wash area.
    - iii. Ensure that the CLT area has a no-contact thermometer to screen respondents for fever.
    - iv. Install footbaths in the CLT area.
    - v. Spray alcohol on respondents' hands or ask them to wash their hands before entering the CLT site.
    - vi. If possible, put alcohol spray for regular disinfection of the field personnel and respondents during the day. If having alcohol is not possible due to scent/fragrance or taste evaluation during CLT, the hand wash area should be accessible to both staff and respondents.
    - vii. Where possible, install protective barriers between respondents and the interviewer for the face-to-face interviews.
    - viii. Always make the receptacles for proper disposal of face masks and other protective paraphernalia available in the panel sites.



- ix. Disinfect area thoroughly and frequently BEFORE AND REGULARLY DURING THE DAY (AM, LUNCH BREAK, MID AFTERNOON).
- e. Follow Standard Health and Safety Protocol During Test Proper
  - i. Ensure that the food handler has a face mask, hairnets, gloves, and hand sanitizers always during fieldwork.
  - ii. Ensure that field personnel doing the interviews wear a mask all the time.
  - iii. Ensure that the respondent wears a mask during interviews. Agencies should provide masks to the respondents who come without the required masks and face shields.
  - iv. Ensure that all persons in the test area (respondents and personnel) do not remove their masks during the interview.

#### **D. FGDs / IDIs/ Home Visits**

MORES believes that it is still safer for everyone to keep qualitative research virtual. Virtual allows more flexibility, more accessibility (to respondents and clients), and allows for non-verbal cues observation which is critical in qualitative work.

However, should there be a need for face-to-face encounters, the following are recommended:

1. Everyone involved in the research, both researchers and respondents, take antigen tests before entering the venue (sponsored by clients)
2. Venue should be spacious enough to follow social distancing between participants
3. Ensure proper ventilation and air purification in the enclosed space. All participants should always wear their face masks. Masks can only be taken off to eat and drink. Preferably, no talking when masks are off.
4. Venue might need to invest in microphones for better audio while wearing masks.
5. Venue should have restroom or good cleaning facility for any health / bodily needs of all people involved.
6. Ensure enough time in between sessions so that the moderator has enough time to fully rest.
7. Make sure there is a comfortable and safe venue for the participants/respondents waiting for the succeeding sessions.

## **VI. OTHER ITEMS**

### **A. RESEARCH AMONG IMMUNO-COMPROMISED SEGMENTS**

MORES and AMOS still recommend limiting the research among immuno-compromised segments to ONLINE RESEARCH and TELEPHONE INTERVIEWS ONLY. If necessary to do face-to-face survey among these segments, ensure strict implementation of the minimum health standards in accordance with the IATF guidelines.

Immuno-compromised segments include:

- a. Children aged below 18 (or can be below 15 depending on specific LGU standard)
- b. Elderly (above 65 years old)
- c. Pregnant women
- d. Individuals who have been diagnosed to have life threatening conditions such as cancer, diabetes, COPD, hypertension

### **B. RESEARCH AMONG HEALTH CARE PROFESSIONALS IN HOSPITALS/HEALTH CENTERS**

MORES and AMOS still recommend limiting the research among health care professionals to ONLINE RESEARCH or TELEPHONE INTERVIEWS ONLY.

### **C. RECRUITMENT OF DATA GATHERERS/ FIELD INTERVIEWERS**

It is important to assess the medical and mental health condition of the field researchers that you are recruiting. Encourage and assist all employees to avail of covid-19 vaccination.

Workers should disclose the following medical conditions which are especially high-risk during this pandemic:

- Diabetes
- Hypertension
- Asthma/respiratory disorders
- Heart diseases

Encourage field workers (current and new/applicants) with any of the above diseases and other co-morbidity cases to get themselves vaccinated.

Similarly, workers should disclose when they are suffering from mental health conditions including but not limited to depression, anxiety, or substance abuse.

## **VII. MOVING FORWARD**

We recommend that everyone keeps abreast of the latest guidance issued by leading local and international health institutions tracking the disease. Please review daily the developments from reputable sources such as DOH, WHO, CDC. Monitoring the government's contingency plans and its implications to us will be of utmost importance as we all navigate how best to do our work.

The MORES Professional Standards Committee and AMOS will issue updated quarantine classifications for the market research industry regularly. Please check the MORES FB page / website for regular updates.

We encourage all MR practitioners to regularly visit the following websites:

- A. Updates on COVID-19
  - a. Updates from the Department of Health
  - b. COVID-19 Tracker from the Department of Health, based on Testing Facility
  - c. Updates on government/IATF pronouncements from the PCOO website
- B. General Information
  - a. Frequently Asked Questions in Filipino, from the Department of Health
  - b. In English, from the World Health Organization
  - c. In English, from the Centers for Disease Control and Prevention

Do keep your respective organizations up-to-date with the latest guidelines by sending out constant communications to your staff via SMS, emails, putting up strategically located reminder posters and signages.

Let us also share experiences with each other so we can all learn how to do our work safely and efficiently.

You may contact the MORES Secretariat at [secretariat.mores@gmail.com](mailto:secretariat.mores@gmail.com) or AMOS Secretariat at [amosthotline@gmail.com](mailto:amosthotline@gmail.com).

**APPENDIX 1.** Summarized Guideline on the Implementation of Alert Level System for Covid 19 Response as of March 1, 2022, Implications on Market Research & MORES Recommendation Under the Granular Lockdown.

ALERT LEVEL	5	4	3	2	1
Case counts	Alarming	High and / or Increasing	High and / or Increasing	Low / or low but increasing	Low
Case transmission	Alarming	High and / or Increasing	High and / or Increasing	Low and decreasing	Low and decreasing
Hospital Bed Utilization	Critical	High	Increasing	Increasing	Low
ICU utilization Rate	Critical	High	Increasing	Increasing	Low
<b>INTRAZONAL &amp; INTERZONAL MOVEMENT</b>	Limited to accessing goods and services from permitted establishments, for work in such establishments or activities allowed under this level.  VULNERABLE SEGMENTS NOT ALLOWED EXCEPT for obtaining essential goods and services, or for work in industries and offices or such other activities permitted under this level.	Allowed subject to the reasonable regulations of the LGU of destination  VULNERABLE SEGMENTS NOT ALLOWED EXCEPT for obtaining essential goods and services, or for work in industries and offices or such other activities permitted under this level OR UNLESS FULLY VACCINATED.	Allowed, subject to LGU rules but should not be stricter than Level 4.	Allowed, subject to LGU rules but not stricter than the higher alert levels.	Allowed, subject to LGU rules. Following shall be implemented:  I. PREVENT II. DETECT III. ISOLATE & QUARANTINE IV. TREAT V. RE-INTEGRATE  See IATF Issuance <a href="https://pcoo.gov.ph/wp-content/uploads/2022/02/20220227-IATF-GUIDELINES-RRD.pdf">https://pcoo.gov.ph/wp-content/uploads/2022/02/20220227-IATF-GUIDELINES-RRD.pdf</a> for details.
<b>ALLOWED TO OPERATE OR BE UNDERTAKEN</b>	<b>Full-On Site Capacity:</b> Essential industries & establishments like hospitals, groceries, export-oriented businesses, pharmacies, public transport, financial institutions, and the likes  <b>Maximum 50% Capacity:</b> Media establishments  <b>On-Site Skeleton Workforce:</b> Medical and veterinary clinics, banks and money transfer services, utility companies, airline, funeral and embalming services, printing, engage in repair and maintenance of vehicles, recruitment and placement agencies, etc.	<b>Maximum 10% indoor capacity for fully-vaxx + 30% outdoor capacity if issued a Safety Seal Certification:</b> Venues for MICE, social events, visitor or tourist attractions, amusement parks, recreational venues  <b>Maximum 10% indoor capacity for fully-vaxx + 30% outdoor capacity provided all workers are fully-vaxx and minimum public health standards are strictly implemented:</b> In-person religious gatherings, licensure exams, Dine-in services, personal care establishments, fitness studios/gymns, entertainment productions.	<b>Maximum 30% indoor capacity for fully-vaxx + 50% outdoor capacity and minimum public health standards are strictly implemented::</b> Venues for MICE, social events, visitor or tourist attractions, amusement parks, recreational venues, cinemas, limited in-person classes for higher education and vocational training, licensure and qualifying exams, dine-in services, personal care establishments, fitness studios, entertainment production	<b>Maximum of 50% indoor venue capacity for fully vaccinated individuals and those below 18 years of age, even if unvaccinated, and 70% outdoor venue capacity provided all on-site workers ro organizers are fully-vaxx:</b> Venues for MICE, social events, visitor or tourist attractions, amusement parks, recreational venues, cinemas, limited in-person classes for basic education with prior approval from the office of the President, limited in-person classes for higher and for vocational training, in-person religious gatherings, licensure and qualifying exams, dine-in services, personal care establishments, fitness studios, entertainment productions, contact sports if approved by LGU, funfairs and kids amusement industries, venue with live voice and wind instruments, gatherings in residences with individuals not belonging to the same household.	All private offices and workplaces, including public and private construction sites, may operate at full 100% capacity (consistent with national issuances on vaccination requirements for on-site work). However, they may continue to provide flexible and alternative work arrangements as deemed appropriate based on function or individual risk.
<b>NOT ALLOWED TO OPERATE OR BE UNDERTAKEN</b>	All except stated in the allowed to operate or be undertaken.	In-person classes for basic, higher and technical/vocational education, all contact sports, cinemas, funfairs and kids amusement industries, venues with live-voice or wind instrument, casinos and other gaming establishments, gatherings in residences with individuals not belonging to the same household.	In-person classes for basic education, contact sports, funfairs and kid amusement industries, venues with live-voice or wind-instrument, casinos and other gaming establishments, gatherings in residences with individuals not belonging to the same household.	Casinos and other gambling and gaming establishments unless maybe authorized by IATF	None.

ALERT LEVEL		5	4	3	2	1
Case counts		Alarming	High and / or increasing	High an /or Increasing	Low / or low but increasing	Low
Case transmission		Alarming	High and / or increasing	High and / or increasing	Low and decreasing	Low and decreasing
Hospital Bed Utilization		Critical	High	Increasing	Increasing	Low
ICU utilization Rate		Critical	High	Increasing	Increasing	Low
Implications to the Market Research Operations		Not allowed to operate on-site	Allowed 100% operation but to follow the minimum health standards strictly..  We recommend WFH if possible.	Allowed 100% operation but to follow the minimum health standards strictly..  We recommend WFH if possible.	Allowed 100% operation but to follow the minimum health standards strictly.	Allowed 100% operation but to follow the minimum health standards strictly.
Recommended MR activities	House-to-House	Contactless MR activities only - online, phone, mobile	Possible provided the area is not under granular lockdown. Check with the barangay/area destination prior to visit. Secure permission to conduct survey in the area.	Possible provided the area is not under granular lockdown. Check with the barangay/area destination prior to visit. Secure permission to conduct survey in the area.	Possible provided the area is not under granular lockdown. Check with the barangay/area destination prior to visit. Secure permission to conduct survey in the area.	Possible provided the area is not under granular lockdown. Check with the barangay/area destination prior to visit. Secure permission to conduct survey in the area.
	CLT		Not recommended.	Possible but ensure that the combined number of staff and respondents will not exceed <b>30% of venue capacity</b> .  As much as possible, all staff and respondents are fully-vaccinated.	Possible but ensure that the combined number of staff and respondents will not exceed <b>50% of venue capacity</b> .  As much as possible, all staff and respondents are fully-vaccinated.	Possible at <b>100% of venue capacity</b> .  As much as possible, all staff and respondents are fully-vaccinated.
	FGDs		Only virtual is recommended.	Only virtual is recommended.	Only virtual is recommended.	Possible but virtual is recommended
	IDIs					
	IHVs					
MORES Disclaimer		Tha above recommendations depend on the actual conditions of the venue and survey area. MORES strongly recommends that the agencies put the highest priority on safety of researchers and respondents and avoidance of spread of covid-19 when making decisions on research activities.  In the exercise of the recommended market research activities, MORES urges the market research industry to follow the recommended protocol / guidelines for doing market research amidst health crisis.				
HOTLINES		AMOS Secretariat: <a href="mailto:secretariat.mores@gmail.com">secretariat.mores@gmail.com</a> AMOS Secretariat: <a href="mailto:amosthotline@gmail.com">amosthotline@gmail.com</a>				