

Effective Survey Design

Webinar presented by



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PRESENTERS

Al Onkka – Principal Consultant

Al is experienced in promoting data-based decision making and organizational learning having worked in the field of evaluation since 2009. Al uses, and builds the capacity of others to use, an evaluative lens to help organizations develop, understand and improve at the programmatic and organizational level. An evaluative lens allows stakeholders to look at issues from multiple perspectives, ask the right questions, and communicate clearly about outcomes. Al served on the boards of Rainbow Rumpus and Minnesota Evaluation Association.



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Sarah Cohn – Principal Consultant

Sarah Cohn helps her clients discern their audience's needs; think about their roles and opportunities as departments, organizations, and within broader networks; and build their internal capacity to measure the impact of their organizations and programs. In her experience, complex collaborations with diverse partners succeed when they build in time for listening and honest reflection. She sees her clients as the content experts and herself as the facilitator of nuanced conversations. Sarah serves on the boards of One Voice Mixed Chorus and the Minnesota Evaluation Association.

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Big Questions

We conduct studies to get information to inform our learning, action, and decision-making. Before you start, think carefully about these big questions. They are the foundation of your survey and guide its development.

1. What do I need to know?

Identify your need in clear language. This is the big picture purpose of your survey. Don't lose sight of it!

2. Who knows it?

Given your need, who should you ask for information? They are your audience. Also consider where information might exist that could help you without you needing to ask people questions.

3. How will I use the results?

Identify the actions you are going to take with the results. When written, check to make sure the questions in your survey will get the information you need to take those actions.

4. What is the best method?

Think about your purpose, audience, and usage. Is a survey the *best way* to get information that fits your need? What type of survey would work best? Would another method work better?

Big Problems

You may have big problems, if you don't consider the big questions. Here are some of the fundamental problems that keep surveys from being successful.

1. What do I need to know?

A survey without a clear purpose either doesn't answer any of your questions or tries to answer way too many, which is the same thing.

2. Who knows it?

Sometimes we ask the wrong people. Other times, we ask questions that no one can answer!

3. How will I use the results?

If you don't consider how you are going to use the results of your survey, you may get results that you can't use!

4. What is the best method?

If you ask questions that aren't appropriate for a survey, you get bad results and survey takers experience frustration. The same goes if a survey is not appropriate for your audience.

Your survey may lack purpose if:

- You don't know why you are doing the survey.
- You have a hard time figuring out what to ask about on the survey.
- You feel like you have way too many things to ask about.

You may have the wrong audience if:

- Many questions are skipped.
- You have a hard time getting people to start or finish the survey.

If you can't answer it, you may be asking a question to which no one knows the answer.

You may need to think about use if:

- You can't identify who is going to use the results.
- You can't say how the results from previous surveys have been used.

You may need to consider another method if:

- Your questions are mostly open-ended.
- Your questions are multi-faceted or complex.
- Your audience would struggle with accessing, understanding, or completing a survey.

Encouraging Survey Participation

With every survey, you want to increase the benefits and decrease the costs of taking the survey, all while establishing trust between you and the survey taker.

Consider your survey's purpose, audience, and method:

1. Why would someone **want** to fill out your survey? What are the benefits to them?

2. What could you do to demonstrate or increase those **benefits**?

Ways to increase benefits

- Ask for help or advice.
- Provide information about how the survey benefits them or others they care about.
- Show respect for the person, their effort, and time.
- Say thank you.
- Support their values. E.g. Public radio supporters value state parks.
- Make the survey interesting.
- Give tangible rewards or incentives.
- Other things you could do? _____

3. Why would someone **not want** to fill out your survey?
What are the costs for them?

4. What could you do to decrease those **costs**?

Ways to decrease the costs

- Make it convenient to respond.
- Make the survey short and easy to complete.
- Minimize requests for personal or sensitive information.
- Avoid subordinating language.
- Emphasize similarity to other requests or tasks to which a person has already responded.
- Other things you could do? _____

5. What is the level of trust between you and your survey takers?

5. What could you do to establish **trust** with the survey taker?

Ways to establish trust

- Emphasize your brand.
- Provide a token of appreciation in advance.
- Show that you have put important effort into the survey.
- Ensure confidentiality and security of information. Or emphasize anonymity.
- Other things you could do? _____

Adapted from: Dillman, Don A., Jolene D. Smyth and Leah Melani Christian. 2009. Internet, Mail and Mixed-Mode Surveys: The Tailored Design Method, 3rd edition. John Wiley: Hoboken, NJ, p. 22-28

Survey Question Writing Tips

Surveys are only as good as the questions you ask. Spend as much time as you need making sure that you are asking questions that will make sense to participants and provide you with the information you need.

Ask a question. Avoid giving commands.

Avoid

Please tell me the last time you visited the doctor.

Ask Instead

When was the last time you visited the doctor?

Be specific. Ask what you really want to know.

Avoid

What is the condition of your car?

Ask Instead

Is your car drivable?

Balance questions to avoid introducing bias.

Avoid

How satisfied were you with your trip today?

Ask Instead

Were you satisfied or unsatisfied with your trip today?

Use language your audience would find natural and conversational.

Avoid

How enjoyable was this movie, if at all?

Ask Instead

How much did you enjoy this movie, if at all? *Or even:* Did you like this movie or not?

Avoid frustrating or burdensome questions.

Avoid

How many times have you visited this museum in the past two years?

Instead

Find another way to gain this information or be more specific.

Don't ask two questions in one. Avoid "and" and "or."

Avoid

How quick and friendly was your cashier, if at all?

Ask Instead

1. Was your cashier quick or slow?
2. Was your cashier friendly or unfriendly?

Avoid giving examples. Make your question stand on its own.

Avoid

How much, if at all, do you like to learn about science (for example, how computers work, how rain forms, or how airplanes fly)?

Ask Instead

How much, if at all, do you like to learn about science?

Or

How much, if at all, do you like to learn about:

1. How computers work?
2. How rain forms?
3. How airplanes fly?

Ask questions that are relevant and interesting to your audience.

Avoid

Starting the survey with demographic or other administrative questions.

Ask Instead

Something that draws the survey taker into your survey.

Don't let participants skip questions.

Avoid

Letting participants decide which questions to answer or not.

Instead

Use arrows or text instructions on paper surveys.

Use skip logic on online surveys.

Include "does not apply" or "I'm not sure" on questions where those options are possible for your audience.

Three Email Invitation Examples

Use the tips for encouraging participation when you write invitations to the survey. Some samples are included below with annotations. Feel free to borrow ideas.

If you are sending follow up reminder emails, make the second email different! Don't just send the same email twice. If it didn't work the first time, it won't work the second time. Use different strategies to encourage participation in each email.

There are two great places for ideas about how to encourage participation:

- 1) Your development person. Asking for money and asking for survey responses are the same thing.
- 2) Public Radio member drives. They are excellent at encouraging participation and it's a fun game to identify which method they are using.

BOOKING SURVEY: EMAIL 1

Dear [contact("first name")],

Thank you for booking the Big Weather Experience at the Science Museum of Minnesota. The Big Weather Experience is a new type of field trip for us, and we are listening carefully to teachers about what they think of it. Click the link below to start the 3 minute survey.

This ask has a short to the point intro, then right to the link. If teachers still are unsure, they can read on.

Your survey link: [invite("survey link")]

We need your help! Please take a moment now to take a short survey about your Big Weather Experience booking. Your feedback will help me and my team improve our field trips for future students and teachers.

I know teachers are extremely busy this time of year so I've made the survey quick and easy. It should take 3 minutes or less to complete. I've already entered your name into a drawing to win one of five \$20 Amazon gift cards. You don't need to do anything to win.

Thank you! Please contact me by email or phone if you have any questions about this survey.

I show that their response is valuable to me by offering my time to them.

Sincerely, Al Onkka

BOOKING SURVEY: EMAIL 2, NON-RESPONDENTS

Dear [contact("first name")],

I contacted you a few days ago to ask about your experience booking the Big Weather Experience field trip at the Science Museum of Minnesota. I'm writing now because I haven't yet heard back from you.

Please take a moment now to complete the very short survey at the following link. Other teachers have been completing it in 3 minutes or less.

Click here to start: [invite("survey link")]

I am part of an institution-wide team at the Science Museum tasked with improving the field trips we offer to schools. The Big Weather Experience is a new product from this team.

We are eager to hear about your experience booking the field trip. We read every survey and use the responses to make improvements to our field trips.

Thank you so much for your help! I've already entered your name into a drawing to win one of five \$20 Amazon.com gift cards. You don't have to do anything to win and I won't bother you again about this survey.

Sincerely, Al Onkka

I emphasize that the email is coming from a single person who is paying attention to who responds. The survey is short so just do it now! Don't put it off.

I emphasize the importance of the survey by referencing my team and saying we read every response.

I build urgency and trust by saying that this is the last email I will send them.

SEWARD COOP MEMBER SURVEY

Hello,

The past year was a busy one for Seward Community Co-op. We opened a second grocery store, the Friendship store in the Bryant neighborhood, and a restaurant, the Co-op Creamery Café. With so much change, we would like to hear how co-op owners think we are doing. We are conducting a customer survey that will give co-op management much-needed feedback on how well we are serving our owners' needs. Please click on the link below to take the online survey. **A \$50 gift card will be given to five randomly selected survey participants!**

They give context for the survey and say that the feedback is "much-needed." They emphasize the incentive.

We are working with the Survey Research Center at the University of Wisconsin-River Falls to conduct this evaluation. (If you reply to this email, it will go to Dr. David Trechter at the Survey Research Center and not to Seward Co-op.) The Survey Research Center's participation will ensure an unbiased assessment of the data and your anonymity. The results they report will only be at the aggregate level and your individual responses will not be associated with you in any way.

They emphasize the importance by identifying their researchers by department and name. Then they assure anonymity.

Your participation in this survey is voluntary but would be greatly appreciated. **Please click on the link below and complete the survey by February 15, 2016.**

They kind of say thank you and give a date for completion. Be careful with due dates. Know your audience and whether they need a due date. If your survey is long, you may need to give a due date. If your survey is short, you want people to do it right away. Not put it off.

Sincerely,

Seward Co-op

Follow this link to the Survey:

[survey link]

Follow the link to opt out of future emails: [Click here to unsubscribe](#)