Conducting Surveys: A Primer for TU Chapters and Councils

Membership surveys are an excellent tool for chapters and council to obtain information from their members. Survey questions may be used for understanding why members lapse, what kind of programs will attract members, what barriers exist that limit participation, evaluating current programs or leadership… among other uses. Designing and implementing a survey can appear daunting. Yet numerous internet tools, such as Survey Monkey, exist to facilitate surveys. This combined with TU's bulk e-mail tool in the Leaders Only Tools section of tu.org makes conducting surveys relatively easy. This document is intended as a primer on developing and implementing good surveys. It outlines the primary dimensions of quality research. Readers are encouraged to seek out additional information on specific topics.

A. Before You Start: Before you begin the process you should have clearly articulated goals for the survey. You should be able to state clearly exactly what you want to learn from your membership. Goals will provide the touchstone for evaluating whether questions should be included or discarded. It is far too easy for surveys designed by committee to quickly grow to unmanageable proportions. As a general rule, short surveys are better than long surveys. Having a clear goal helps keep the process manageable.

B. Kinds of Surveys: There are basically two kinds of surveys: sample surveys and non-sample surveys.

Sample surveys select a subset of members of the population to complete the survey. The primary distinction is between the sample – the subset – and the population – the entire group about which you want information. Researchers use techniques to select the sample so that biases are eliminated and sound inferences can be made from the sample to the population. Well done sample surveys allow for calculation of error and can be used with a wide variety of statistical tools. Most chapters will not engage in sample surveys so discussion of sample size, margins of error, and so forth are moot though some researchers will still calculate them even when not warranted.

Chapters and councils, on the other hand, will most likely employ non-sample techniques referred to as population surveys, censuses, or non-parametric techniques. Rather than selecting a sample, chapters will invite their entire membership to participate. Chapters and councils will be more concerned with the rate of return – what proportion of membership actually return the survey – and, more importantly, potential bias in the returns. The most critical bias is due to those completing the survey being systematically different from those not completing the survey. The easiest way to assess the potential for this kind of bias is to compare returns to what is known from the entire membership database. Unless a chapter or council maintains a more information rich database than that supplied by TU, only limited comparisons can be made. ZIP code, length of membership, type of membership, and gender are examples of variables that can be used. While the potential for bias urges caution in drawing strong conclusions about the results, surveys can still be very useful as long as they are used with a clear understanding of limitations.

C. Implementation of Surveys: Surveys are normally collected in one of four ways: phone, mail, internet and intercept.

Phone surveys: Phone surveys offer the best returns but they are very labor intensive and costly if membership is large. If a chapter has a small membership and a good cadre of volunteers then putting together a phone survey may actually be the best option. Plus the phone contact is a very positive reminder of membership. Data entry into analytical software is another labor intensive aspect of this approach.

Mail surveys: The survey is designed, printed, and mailed out to members often with a stamped, addressed return envelope. While mail surveys appear to be less costly, when printing, mailing and data entry are factored in, they can be very pricey for large chapters or for councils. Stuffing envelopes is tedious and lots of volunteers help immensely. If budgets permit, employing a direct mail firm or one of the printing series like CopyCat or

Kinkos will facilitate the process. Typically they handle everything except designing the questionnaire and the cover letter.

Internet surveys: Internet surveys have become a major means of collecting data. Programs such as SurveyMonkey help with developing the questionnaire and the bulk e-mail tool in the Leaders Only Tools section of tu.org will deliver invitations containing a link to member's mailboxes. They are not very costly to implement. Internet surveys have the greatly added advantage of delivering the results in a database that can be analyzed quickly. Many of the online programs actually create analytical tables or charts automatically and almost instantaneously so that results can be shared with leadership or membership quickly. None of this requires particular expertise in any aspect of the process. Internet surveys, however, appear to suffer from low return rates so that results may be unknowingly biased.

Intercept surveys: Intercept surveys and a related type, Kiosk surveys, are good instruments to use where chapters have very large number of people in a central location from whom they want responses. Intercept surveys, sometimes called mall surveys, employ interviewers who stop potential respondents and ask them to complete a survey. The survey may be administered by a person or the interviewee may fill out a form. Kiosk surveys are similar though they often have work stations or booths for capturing interviewees. These are of limited utility to chapters though if a chapter is interested in getting data from non-members then they can be quite useful.

D. Questionnaire Design: Another source of bias in survey research stems from the design of questions. Poorly designed questions provide poor data on which to base decisions. This is one area that deserves great scrutiny from those working on the survey project. There are basically two kinds of questions asked: closed ended questions, sometime called fixed choice questions, and open-ended questions.

Closed ended questions: This type of question design asks the question and then provides a limited range of response choices to the interviewee. These are by far the most common type of question asked. They demand that the designer be able to anticipate the full range of possible options to the question and that answers are mutually exclusive so that only one choice is possible. And they need to be carefully crafted to eliminate possible bias. These types of questions are uni-dimensional (narrow questions) but they are analytically far more tractable than open ended question. These can be analyzed statistically and converted into graphic presentation quickly.

Open-ended questions: For most people, these questions offer a greater richness as they allow respondents to "say what's on their mind" without the limitations of closed questions. This is true, but the richness comes with a price. Verbatim response questions can handled quite well when the number of responses are low. Merely read them and think about what respondents are telling you. It's a good way to find out how members think about what you are doing. With large numbers of responses, and with a large number of open questions, analysis can be daunting. Professionals would likely read all the answers, create response categories based on the range of responses, and then categorize them for statistical or graphical presentations. Specific comments may be used as quotes to enhance written reports. Information richness comes at the price of time-consuming analysis.

Principles of question design: This can be a complex topic far too involved for a short document. It is important that care be used in creating questions as questions are a primary source of bias. There are numerous online sources for survey design. The following considerations were taken from HowTo.Gov, site that facilitates surveys for public agencies.

- Keep questions short and easy to read. The longer and more complex the questions, the less accurate feedback you'll get. This is particularly true of phone surveys.
- Keep questions easy to answer, otherwise participants may abandon the survey, or provide incorrect information (e.g., giving the same answer/value for all questions, simply to get through the survey).
- Use a consistent rating scale (e.g., if 5=high and 1=low, keep this consistent throughout all survey questions).
- For rating scales, make sure your scale is balanced (e.g., provide an equal number of positive and negative response options).
- Label each point in a response scale to ensure clarity and equal weight to each response option.
- For closed-ended questions, include all possible answers, and make sure there is no overlap between answer options.
- Use consistent word choices and definitions throughout the survey.
- Avoid technical jargon and use language familiar to participants.

- Be as precise as possible to avoid word choice confusion. Avoid words like “often” or “rarely”, which may mean different things to different people. Instead, use a precise phrase like “fewer than three times per week.”
- Try to construct the questions as objectively as possible.

E. Invitations to Participate: While phone surveys and intercept surveys permit interviewers to establish some rapport with respondents to facilitate compliance, in internet and mail surveys the only opportunity you have to convince members of the value of participating is in your invitation letter. Good invitation letters should be personable but set out clearly why the respondent is getting the message, what the purpose of the survey is, and how it will be used. In addition, it should convince the respondent that his or her response is valuable. Incentives to participate are often used: a prize drawing, coupons, discounts at a fly shop and so forth. These are popular because those initiating the survey are convinced incentives will have a big impact. Available evidence suggests that incentives may increase participation by a few percentage points, but they do not have the “big” impacts that planners anticipate.

F. Analysis: If you are using an online resource for survey administration then data entry is handled by the program and analysis is facilitated as the software will typically output frequency tables (number and percentage of respondents who chose each response) and graphics of the table. More sophisticated analysis may be possible but is generally not the norm.

On mail surveys, phone surveys using pencil and paper scripts, or intercepts, you will need to enter the data into some software for analysis. The most often used software for this is EXCEL where each row represents a respondent and each column a question response. While EXCEL is great at entry and storage, it is a very weak tool for statistical analysis. There are Excel add-ons that facilitate analysis but these are cumbersome and difficult for novices to use. Statistical software such as SPSS, Strata, STATPAC and so forth are available but can be expensive. A good solution is to elicit the help of someone at a nearby college or university that has access to these programs. Most of these programs will read EXCEL files, and, once entered, analysis is quite speedy.

G. Online Resources to Help:
Title: Ten easy ways to increase response rates for your online survey
Description: This article was produced by the Rockefeller College of Public Affairs and Policy (non-profit). It describes ways to increase the responses for a survey: (1) Target your audience; (2) Personalize your email initiations; (3) Keep your email invitation short; (4) Make your first survey page simple; (5) Be clear about privacy protections; (6) Send reminder emails; (7) Consider offering incentives; (8) Some people just want to share their opinion; (9) Use graphics and Internet features strategically; and (10) Publish your results online to survey participants.
Link: http://www.questionpro.com/a/showArticle.do?articleID=deploy01

Title: Non-Profit Surveys (Survey Monkey)
Description: This article provides an outline for what your survey should look like as a general template. It provides a couple of basic tips for starting the survey, such as: (1) Clarity; (2) Objective; and (3) Test drive (pilots). The website also showcases the abilities of Survey Monkey for Non-Profit organizations.
Link: http://www.surveymonkey.com/mp/non-profit-surveys/

Title: Non-Profit Industry Research
Description: In the crowded nonprofit industry you need to stay ahead of the competition for donors, grants, and mindshare. Our primary and secondary research on the nonprofit industry can help you benchmark your organization against your peers. Here you can read, at no charge, results of industry surveys, along with analysis and secondary research from respected nonprofit researchers. You have to enter you email address to get access to benchmarking on the current studies, however it does not cost.
Link: https://www.blackbaud.com/nonprofit-resources/industry-research.aspx

Title: Tools for administering Non-Profit Surveys
Description: These two website is useful if you are looking for the best choices or online software for development and deployment of your survey. It compares the top tools in the industry with a short description of each.
Link: http://www.socialbrite.org/2010/09/16/5-top-online-survey-tools-for-nonprofits/
http://www.techsoup.org/support/articles-and-how-tos/few-good-online-survey-tools

Title: Non-Profit Employee Survey Rules

Description: This article provides you with a basis of rules and guidelines for administering non-profit surveys (specifically employee surveys). It provides a sample memo for volunteers and explains how to handle participants who do not have access to the web version of the survey.
Link: http://www.oregonbusiness.com/oregon100best/surveys-and-events/oregon-100-best-non-profit-event/10399-nonprofit-employee-survey-rules

Title: Creating Online Surveys for Your Non-profit Organization
Description: This article provides examples of how the success of an online survey will depend more on how you define what you're looking for, how you relate to your target audience and how well you execute the details. This article describes these factors and gives you tips to follow to ensure you get the most, best data possible – and while we're at it, the most satisfied respondents, too.
Link: http://www.surveyexpression.com/surveys/survey-articles/creating-online-surveys-for-your-non-profit-organization/

Document prepared by Don Haynes, Maryland Trout Unlimited.