Planning a Customer Survey

Part 1 of 3

Elaine Carlson, Westat
Anne D’Agostino, Compass Evaluation & Research
Purpose of the Webinar Series

- Provide guidance to grantees in planning, designing, and conducting high-quality customer surveys
Components of the 3-Part Webinar Series

Planning a Customer Survey
- Purposes of customer surveys
- Who, what, where, how, and when
- Reducing response bias

Designing a Customer Survey Instrument
- Instrument design
- Item development
- Pilot testing

Conducting a Customer Survey
- Modes of data collection
- Enhancing response rates
- Data analysis and use
Why conduct a customer survey?

- Initial planning for grant activities
- Needs assessment
- Outreach to stakeholders
- Formative evaluation and mid-course corrections
- Continuous improvement
- Summative evaluation
Context for the Customer Surveys in Grant Evaluations

- Grant program theory
  - Evaluation plan
    - Evaluation questions
    - Sources of data
  » Plan for a Customer Survey
    - Survey’s purpose, goals, objective
    - Sampling plan
    - Survey items
      - Data collection
      - Analyses
      - Data use
Key Decisions About Customer Surveys

- What are the purpose, goals, and objectives of the survey?
- What is the population of interest?
- Is sampling an option for reducing cost and burden?
- What steps are needed to make the survey accessible?
- What is the best mode of data collection?
- What will your budget and resources allow?
- What question(s) are you trying to answer about the population?
- What specific data do you need to collect to answer the question(s)?
- How often do you need to conduct the survey to answer the question(s)?
Should you partner with a third-party evaluator?

- Does your staff have knowledge and skills in
  - survey design,
  - sampling,
  - item development,
  - data collection,
  - data analysis, and
  - reporting?

- Do the staff with the necessary skills have time for planning and conducting a survey or are they assigned to other activities?

- Do you have available support personnel for
  - conducting phone interviews,
  - stuffing envelopes, doing and tracking mailings
  - programming web surveys, and
  - following up with non-respondents?

- Does your staff have the objectivity for interpreting results, e.g., are they willing to accept negative feedback?

- Will your budget support a third-party evaluator?
Benefits and Limitations of Working with a Third-Party Evaluator

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Limitations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Third-party evaluators can:</strong></td>
<td><strong>Third-party evaluators may:</strong></td>
</tr>
<tr>
<td>• Bring technical expertise in research methodology, statistics, or related topics to the evaluation team</td>
<td>• Add unanticipated or additional cost to the evaluation</td>
</tr>
<tr>
<td>• Provide credibility and objectivity by acting as an external “critical friend”</td>
<td>• Add to monitoring and management tasks focused on the work of contractors</td>
</tr>
<tr>
<td>• Take on responsibility for completing some or all of the (formative and summative) evaluation tasks</td>
<td>• Not know the background or content area as well as project staff</td>
</tr>
<tr>
<td></td>
<td>• Be less available or accessible, as compared to project staff</td>
</tr>
</tbody>
</table>
Should you sample customers and, if so, how?

- What is the population of interest?
- What question(s) are you trying to answer about that population?
- Is sampling an option for reducing cost and burden?
Common Problems with Customer Surveys: Bias

- Under coverage
- Non-response
- Voluntary response
### Systematic Samples: Subjects are selected to be representative of the entire population

<table>
<thead>
<tr>
<th>Target Population</th>
<th>Possible Sampling Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local district administrators</td>
<td>Pick a random sample of districts using ED’s Common Core of Data, then use the web to get the names and contact information of individuals who fit the role you need, e.g., technology directors.</td>
</tr>
<tr>
<td>Technical assistance recipients</td>
<td>Generate a running list of TA recipients and select at random from all or pick from within groups, e.g., those who received targeted or intensive TA.</td>
</tr>
<tr>
<td>Former conference participants</td>
<td>Use a participant list and select every n&lt;sup&gt;th&lt;/sup&gt; name</td>
</tr>
</tbody>
</table>
Convenience Samples: Subjects are selected just because they are easiest to recruit for the study

<table>
<thead>
<tr>
<th>Is it a systematic sample or is it a convenience sample?</th>
</tr>
</thead>
<tbody>
<tr>
<td>To understand your target audience’s need for intensive technical assistance, survey individuals who visit your grant’s web-site</td>
</tr>
<tr>
<td>To describe the knowledge and skills of all state agency personnel, survey those attending a conference session.</td>
</tr>
<tr>
<td>To assess scholars’ confidence to carry out future job-related tasks, survey scholars in a college class.</td>
</tr>
<tr>
<td>To assess school principals’ awareness of your grant’s products, survey principals in 50 schools that are selected by chance from a list of 16,000 schools nationwide.</td>
</tr>
</tbody>
</table>
How large a sample do you need?

- While sample size depends on analysis plans, one place to start is with a sample size estimator:
  - [http://www.surveysystem.com/sscalc.htm](http://www.surveysystem.com/sscalc.htm)
Sample size calculator

What margin of error can you accept? 5% is a common choice

What confidence level do you need? Typical choices are 90%, 95%, or 99%

What is the population size? If you don’t know, use 20000

What is the response distribution? Leave this as 50%

Your recommended sample size is 377
### How frequently should you collect data?

<table>
<thead>
<tr>
<th>How often?</th>
<th>Possible applications</th>
</tr>
</thead>
<tbody>
<tr>
<td>One-time survey</td>
<td>Snapshot of population characteristics</td>
</tr>
<tr>
<td></td>
<td>Initial grant or activity planning</td>
</tr>
<tr>
<td></td>
<td>Post-event evaluation</td>
</tr>
<tr>
<td>Annual survey</td>
<td>Annual planning</td>
</tr>
<tr>
<td></td>
<td>Assessment of progress toward goals</td>
</tr>
<tr>
<td>Pre/post survey</td>
<td>Change in knowledge or skills after an activity or intervention</td>
</tr>
<tr>
<td>Longitudinal survey</td>
<td>Long term retention of knowledge or skills</td>
</tr>
<tr>
<td></td>
<td>Change in skills or behavior</td>
</tr>
<tr>
<td></td>
<td>Trends over time</td>
</tr>
</tbody>
</table>
Takeaways

- Plan, plan, plan.
- Position your survey within the framework of a logic model, evaluation plan, and evaluation questions.
- Think about the ultimate uses of the data and let that drive your design.
- A small systematic sample is better than a large convenience sample.
- Consider available fiscal and human resources.
Benefits of a Well-Designed Customer Survey

- Valid, reliable data for planning, fine-tuning, or evaluating your grant activities
- Credibility when reporting to OSEP and other stakeholders
2nd and 3rd Webinars in the Series

Designing a Customer Survey Instrument
- Instrument design
- Item development
- Pilot testing

Conducting a Customer Survey
- Modes of data collection
- Enhancing response rates
- Data analysis and use
Additional Resources


Questions?

Contact us:

- Elaine Carlson or Anne D’Agostino

CIPP@westat.com