Purpose of the Webinar Series

- Provide guidance to grantees in planning, designing, and conducting high-quality customer surveys
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
Takeaways from Webinar 1

- 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.
Takeaways from Webinar 2

- Start with the overall goal for the survey and then identify specific and measureable objectives.

- When designing the survey, consider
  - what information you need to know,
  - how well will the information you obtain will help you meet the objectives, and
  - what types of questions will provide the information needed.

- Be purposeful in the design of your survey, including the length, format, and item construction.

- Pre-testing is critical for ensuring development of a high-quality survey instrument.
Overview of this Webinar

- Modes of data collection
- Enhancing response rates
- Data preparation and use
Modes of Data Collection: How should you collect your data?

- Telephone or cell phone
- Self-administered
  - Mail and paper-and-pencil
  - Web page
  - Email
    - Link to online survey
    - Fillable PDF or word document for printing
  - Smart phone and tablet
- In-person interviews
- Mixed-mode
## Advantages of Different Modes

<table>
<thead>
<tr>
<th></th>
<th>Phone/Cell Phone</th>
<th>Electronic (Tablet/Smart Phone, Web/Email)</th>
<th>Mail</th>
<th>In-Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost per respondent</td>
<td>M/H</td>
<td>L/M</td>
<td>L</td>
<td>H</td>
</tr>
<tr>
<td>Time to administer</td>
<td>M/H</td>
<td>L</td>
<td>M</td>
<td>H</td>
</tr>
<tr>
<td>Response rate</td>
<td>M</td>
<td>L/M</td>
<td>L</td>
<td>M/H</td>
</tr>
<tr>
<td>Staffing requirements</td>
<td>H</td>
<td>L</td>
<td>M</td>
<td>H</td>
</tr>
<tr>
<td>Ability to handle complex skip patterns</td>
<td>H</td>
<td>H</td>
<td>L</td>
<td>L/M</td>
</tr>
</tbody>
</table>

L=Low, M=Moderate, H=High
## Comparison of Some Free Web Survey Tools

<table>
<thead>
<tr>
<th>Free Versions</th>
<th>Survey Monkey/Zoomerang</th>
<th>QuestionPro</th>
<th>kwiksurveys</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of questions</td>
<td>10</td>
<td>10</td>
<td>No limit</td>
</tr>
<tr>
<td>Responses per survey</td>
<td>100</td>
<td>100</td>
<td>No limit</td>
</tr>
<tr>
<td>Question types</td>
<td>13</td>
<td>15</td>
<td>21</td>
</tr>
<tr>
<td>Skip logic</td>
<td>Not free</td>
<td>Free</td>
<td>Free</td>
</tr>
<tr>
<td>Export Data to Excel, CSV</td>
<td>Not free</td>
<td>Not free</td>
<td>Free</td>
</tr>
<tr>
<td>Export to PDF or Word</td>
<td>Not free</td>
<td>Not free</td>
<td>Free</td>
</tr>
<tr>
<td>Phone support</td>
<td>Not free</td>
<td>Not free</td>
<td>Not free</td>
</tr>
<tr>
<td>Accessible</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>
Managing Data Collection

- Create a timeline with milestones
- Identify personnel
- Maintain data security
- Log and track responses
- Ensure quality control
Problems with Customer Surveys: Low Response Rates

- “A low response rate does more damage in rendering a survey’s results questionable than a small sample, because there may be no valid way of scientifically inferring the characteristics of the population represented by the non-respondents” (American Statistical Association, 1997, p. 7).

- Response rates
  - 85% or better is excellent;
  - 70% to 84% is very good;
  - less than 50% is not representative
Enhancing Response Rates

- Give a reasonable amount of time for participants to receive, respond to, and return the survey.
- Combine data collection modes (e.g., use both telephone and web, or email and paper-pencil)
- Make multiple contacts with respondents
  - Pre-notification
  - Personalized invitation with questionnaire
  - Thank you follow-up
  - Reminder with replacement questionnaire
  - Final reminder
- Ensure confidentiality
- Offer incentives
Checking for Non-response Bias

- If your response rate is between 50% and 70%, consider doing a non-response bias analysis
- Substantial differences between respondents and non-respondents may indicate bias in the data
- Test for non-response bias
  - Follow-up with a sample of non-respondents
  - Compare responses based on selected characteristics (e.g., gender, occupation, length of time in program)
  - For mixed-mode surveys, compare responses between modes
  - Compare responses between initial and late responders
Data Preparation

- Input/enter data accurately
- Clean/edit data
- Code data
Accurate Data Input or Entry

- Data entry methods
  - Direct input by respondent (e.g., electronic survey)
  - Manual data entry by survey administrator
    - Scanning
    - Keying quantitative or close-ended responses
    - Transcription of qualitative or open-ended responses
- Manual data entry requirements
  - Training users to use scanning equipment and software or database/spreadsheet software
  - Establishing data entry procedures
  - Checking original data against entered data
Data Cleaning and Editing

- Check for
  - Duplicate entries
  - Consistency
  - Outliers
  - Missing data
- Replace text with numbers
- Identify inclusion criteria
Data Coding

- Assign number codes to scaled or ranked responses
- Code responses to open/unstructured items
- Code missing data
- Code “Other (specify)” responses
## Sample Data Codebook

<table>
<thead>
<tr>
<th>Variable Name</th>
<th>Description</th>
<th>Data Collected</th>
<th>Units</th>
<th>Data Type</th>
<th>MaxSize</th>
<th>Values and Value Restrictions (blank=none)</th>
</tr>
</thead>
<tbody>
<tr>
<td>AGE</td>
<td>Age of child</td>
<td>Years</td>
<td>numeric</td>
<td>2</td>
<td>3-15</td>
<td></td>
</tr>
<tr>
<td>SEX</td>
<td>Gender</td>
<td>-</td>
<td>numeric</td>
<td>1</td>
<td></td>
<td>1 = Female, 2 = Male</td>
</tr>
<tr>
<td>RACE</td>
<td>Race</td>
<td>-</td>
<td>numeric</td>
<td>1</td>
<td></td>
<td>1 = Caucasian, 2 = African American, 3 = Other</td>
</tr>
<tr>
<td>DATE</td>
<td>Date of event</td>
<td>-</td>
<td>date</td>
<td>6</td>
<td></td>
<td>mm/yyyy</td>
</tr>
</tbody>
</table>
Data Security and Retention

- Ensure data security
- Protect anonymity and confidentiality
- Retain and store data
Data Security

- Access control (limited to specific personnel)
- Authentication (passwords)
- Automatic lock activation (in the event user forgets to log-out)
- Regularly scheduled updates to antivirus software
- Firewalls
- Data encryption
- Physical security (e.g., cabinets and rooms with coded keypads)
- Secure disposal of records (e.g., shredding paper, electronic “wiping” of computer disks and audio or video recordings)
Privacy Assurance

- Anonymous – cannot be traced to respondent
- Confidential – can be traced but is not inappropriately disclosed
- Mask personally identifiable information (e.g., names, addresses, phone numbers, gender)
- Train personnel
Data Retention and Storage

- Consider:
  - How long to retain data?
  - How to store data?
  - Where to store data?

- Remember to use secure methods of data destruction, including destroying backup copies
Analyzing Data to Meet Survey Objectives

- Descriptive statistics, including variance
- Subgroup analyses
  - Type of respondent
  - Service provider, region, or location
  - Threat to confidentiality
- Advanced analysis considered and conducted if appropriate (e.g., factor analysis, reliability, regression).
- Documenting changes over time
  - Graphing data
  - Revised items
  - Pre/post design effects
- Using results from open-ended questions
Takeaways

- Give careful consideration to the mode of data collection in light of your survey population and content.
- Take the necessary steps to maximize response rates.
- Enhance data quality, and save time and money, by planning ahead for data collection, analysis, and reporting.
1st and 2nd Webinars in the Series

Planning a Customer Survey
- Purposes of customer surveys
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Designing a Customer Survey Instrument
- Instrument design
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Additional Resources

- https://www.whatisasurvey.info/


Questions?

Contact us:

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  CIPP@westat.com