

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

Benefits

Third-party evaluators can:

- Bring technical expertise in research methodology, statistics, or related topics to the evaluation team
- Provide credibility and objectivity by acting as an external “critical friend”
- Take on responsibility for completing some or all of the (formative and summative) evaluation tasks

Limitations

Third-party evaluators may:

- Add unanticipated or additional cost to the evaluation
- Add to monitoring and management tasks focused on the work of contractors
- Not know the background or content area as well as project staff
- Be less available or accessible, as compared to project staff

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



Examples of systematic samples

<u>Target Population</u>	<u>Possible Sampling Strategy</u>
Local district administrators	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.
Technical assistance recipients	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.
Former conference participants	Use a participant list and select every n^{th} name

Convenience Samples: Subjects are selected just because they are easiest to recruit for the study



Is it a systematic sample or is it a convenience sample?

To understand your target audience's need for intensive technical assistance, survey individuals who visit your grant's web-site	Convenience
To describe the knowledge and skills of all state agency personnel, survey those attending a conference session.	Convenience
To assess scholars' confidence to carry out future job-related tasks, survey scholars in a college class.	Depends
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.	Systematic

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.raosoft.com/samplesize.html>

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?

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

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

- *Guidelines for Working with Third-Party Evaluators*, available on cippsite.org.
- Dillman, D., Smyth, J., & Christi, L. (2014). *Internet, Mail, and Mixed-Mode Surveys: The Tailored Design Method*, 4th Edition.
- *Survey Fundamentals: A Guide to Designing and Implementing Surveys*, available at http://oqi.wisc.edu/resource-library/uploads/resources/Survey_Guide.pdf.

Questions?

Contact us:

- Elaine Carlson or Anne D'Agostino

CIPP@westat.com