Day 3: Surveys

UNM Evaluation Lab

Summer Institute

2024

Learning Objectives and Suggested Readings

Learning objectives:

- Identify whether a survey is the right tool for your program.

- Understand the pros and cons of survey data and potential solutions.

- Apply strategies to obtain meaningful data from surveys.
    - Link evaluation goals to survey questions.
    - Identify type of question.

Readings:

- Russ-Eft, Darlene, and Hallie Preskill. *Evaluation in Organizations: A Systematic Approach to Enhancing Learning, Performance, and Change*. Basic Books, 2009. **Chapter 10**.

Is a survey right for your evaluation project?

A survey is right for you when you need...

Information from many different people (external validity)

Helpful when your population is in various locations.

Answers to closed-ended questions or short open-ended questions.

You can collect qualitative and quantitative data.

To report results of your evaluation in a concise manner

Examples: Graphs, percentages, group comparisons

You want to compare results over time

Means designing data collection with a timeframe in mind

Pros of Using Surveys

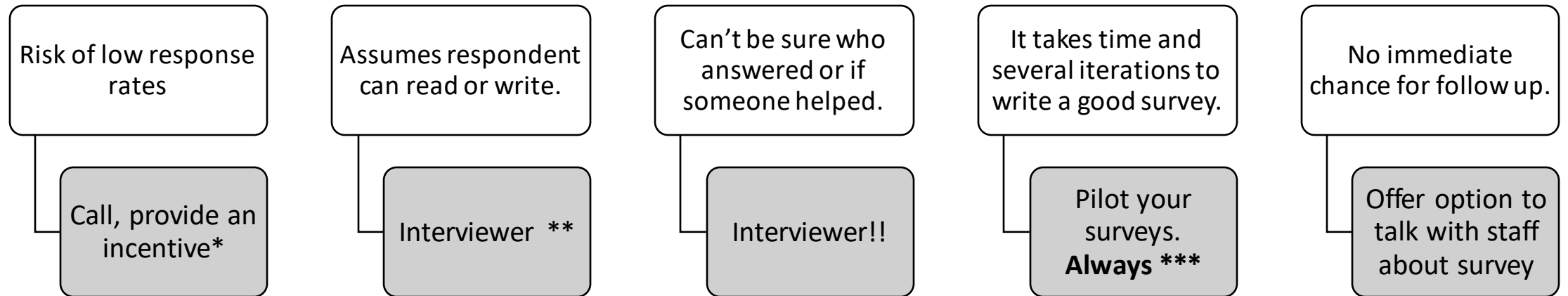|		
Easier to replicate reports once designed	Can collect a representative sample	Anonymity to participants is an option
Surveys are familiar to most people.	Inexpensive *once developed*.	You ask the same question to everyone.

Cons of Using Surveys and some solutions...

Risk of low response rates	Assumes respondent can read or write.	Can't be sure who answered or if someone helped.	It takes time and several iterations to write a good survey.	No immediate chance for follow up.
Call, provide an incentive*	Interviewer **	Interviewer!!	Pilot your surveys. **Always ***	Offer option to talk with staff about survey

* Make sure it is not so much that it plays on people's needs, or so low that it won't motivate anyone. Example, enter a raffle with several prizes, or receiving a gift card for $10-25.
** Have someone not involved with the client administer the survey if it involves evaluating services.
*** A focus group is a great way to pilot a survey! Offer food and childcare to make it easier.

Steps for developing a survey

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Steps

1. Start with what it is you want to learn.

2. Think about your timeline, resources and overall logistics.

3. Write questions (or get them from verified sources).

4. Create the survey and Pilot.

For best results, make sure to talk to key people in each step.

Consider a survey sub-group that brainstorms and/or reviews questions and logistical issues with you.

Step 1. Start with what it is you want to learn

- With your team, explicitly and succinctly define your evaluation goal. This will help you stay focused (avoid data greediness!).

- Translate your question into specific things you want to learn that will help address your evaluation goal.

Examples of Evaluation goals:

✓*Understand why clients may not meet their treatment goals.*

✓*Assess former clients' needs for community services*

Step 1. Start with what it is you want to learn

Evaluation goal: Understand why clients may not meet their treatment goals.

Brainstorm with your team about what your survey needs to tell you so you can tackle your evaluation:

– *Understand barriers to showing up: geography (lives far), childcare/caregiving responsibilities, transportation (has a car, gas cost), economic (not employed), is the client insured.*

– *Experience with services: wait time per session, waitlist to receive services, language of preference, sense of safety*

– *Attributes: Number of children, intergenerational household, etc.*

Step 1. Start with what it is you want to learn

Other strategies to identify more specifically what you need to measure:

- Consider qualitative data collection as a first step before a survey! Your clients, partners, employees can give you a lot of information

- Call your local college or university faculty. How? Contact the department administrator and ask them to refer you to people with experience in what you are doing.

A little table might help

Information needed to answer evaluation question (constructs)	Specific indicators
Barriers: Geographic constraints	Distance from home Transportation (has a car, cost of gasoline)
Barriers: socioeconomic/family	Inflexible work hours Caregiving responsibilities Perception of cost of services (co-pay, unexpected billing)
Experience with services	Satisfaction with: • Program/services • Wait time • Facilities
Demographic characteristics	Age Gender Hispanic origin Intergenerational household

Steps

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[Step 2 can begin before step 1, but you'll have a better sense once you narrow down what you want to learn]

Step 2. Think about your timeline, resources and overall logistics

- Who will lead the survey design? Who will support and how?

- Is this a one-time survey or should it be part of an ongoing assessment? Why?

- How much of staff time should the organization invest? Should (could) an independent firm be hired?

- What are the budget implications?

- Data collection
  - Method (paper, online, why?)
  - Training (recommend role-play)

- What kind of space are you going to need (is info sensitive?), and how are you reaching out to your sample? (Does the targeted sample meet up in the same location or do you need to look for them?)

Steps

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Step 3: Write questions, or get them from verified sources.

Look for validated instruments that get at the outcome you want to measure

- North Carolina Family Assessment Scales
- Protective Factors Survey (Click here for other tools regarding child welfare)
- Trauma Informed Practice Scales
- National Health Interview Survey (a very comprehensive survey, available in Spanish)

Look for questions used in validated instruments, national surveys, research studies

- More likely to have a baseline for comparison
- Self-rated health: "Would you say that in general your health is excellent, very good, good, fair or poor?"   NM IBIS, and NM IBIS questionnaires

Step 3: <u>Write questions</u>, or get them from verified sources

Most common types of questions: Open ended.

- Use when:
    - You don't know range of answers.
    - You want to capture insights on experiences, beliefs, or values.

- Use sparingly
    - Take more time to analyze (resource intensive).

- Use questions that engage respondents to think through the answer
    - Too generic a question might result in people skipping or giving quick answers

        Example: what did you like the most about the program? A: Everything!

    - If not carefully written, might be misinterpreted (not unique to open-ended).

        Example: How did our services compare to your previous provider? (what aspect of services? Check-in, wait time?)

Example – Open ended

Evaluation aim: Assess clients' satisfaction with the program

- Option 1:   What did you like the most about the program?, or

   What would you change about the program?

- Option 2:   How would you describe your experience with the program to a friend?

   What about the program did you find could help others the most?

The open ended question should compel the respondent to think through the answer

Multiple choice questions (close-ended)

- Use when:
  - You are clear about the range of answers
- Type of answers:
  - Check one vs. check all that apply.
  - Likert Scales: Rating scales that go from low to high, with low ones representing negative and highest the positive response.

Example – Multiple choice (2 choices?)

Evaluation aim: Assess cost of care as a barrier to access and utilization of services

(From BRFSS, 2018)

Was there a time in the past 12 months when you needed to see a doctor but could not because of cost?
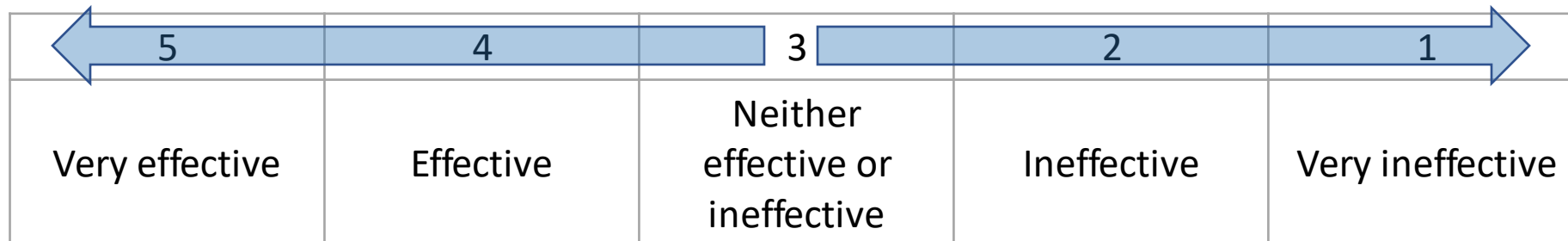
❑Yes

❑No

❑Not sure (sometimes)

❑Refuse (or remind them in the instructions they can refuse!)

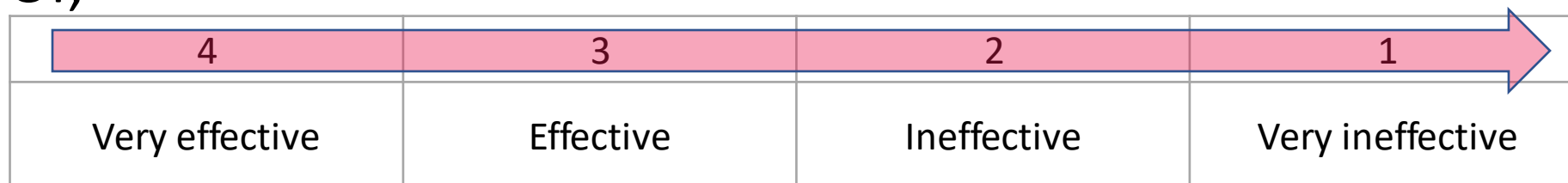# Example – Multiple choice: Likert Scales

- If you want to "quantify" your clients' beliefs or opinions, Likert scales can be helpful.

Would you say the program was:

5	4	3	2	1
Very effective	Effective	Neither effective or ineffective	Ineffective	Very ineffective

Or,

4	3	2	1
Very effective	Effective	Ineffective	Very ineffective

Add Likert scale answer options in the question or in the instructions

- In the past 2 weeks, how much of the time have you felt optimistic about your future? Would you say Always, Most of the time, Sometimes, Rarely, or Never?

- Instructions: The following are statements about safety in the workplace. Please tell us if you **Strongly Agree, Agree, Disagree, or Strongly Disagree with them**.

	Strongly Agree	Agree	Disagree	Strongly Disagree
Employees are responsible for bringing their own safety equipment to work	◯	◯	◯	◯

Add Likert scale answer options in the question or in the instructions

- Answer options do not need to be included in the question every time.

For new hires there should be:

❑More sales training

❑Less sales training

❑No training

❑Current training is just right

Steps

1. Start with what it is you want to learn.
2. Think about your timeline, resources and overall logistics.
3. Write questions, or get them from verified sources.
4. Create the survey and Pilot

For best results, make sure to talk to key people in each step!

Step 4: Create the Survey and pilot

- Paper or electronic form

- Interview or self administered

- Less is more
  - Don't be data-greedy.
  - Make sure every question helps you learn what you want to know (Step 1)

- Help with scales
  - Trauma-Informed Practice (TIP) Scales ➡

How Do You Feel About This Program?

We would like to ask you some questions about how it feels to participate in this program. We are especially interested in the extent to which staff at this program recognize your challenges and difficulties, as well as your strengths and coping strategies.

(A) Please let us know how true the following statements are **as you think about your interactions with staff in this program** on a scale from 0 to 3. You may feel different ways about different staff members. Please respond with your overall impression of the staff. This picture will help you think about that:

	Not at all true	A little true	Somewhat true	Very true
	0	1	2	3
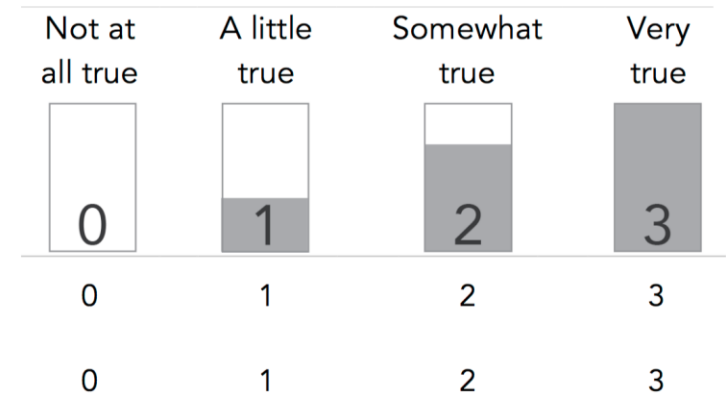
1. Staff respect my privacy.	0	1	2	3
2. Staff are supportive when I'm feeling stressed out or overwhelmed.	0	1	2	3

Step 4: Create the Survey and pilot

Pilot questions with 3-5 program participants

- Time how long survey takes

- Find out:

- Were questions clear?

- Can you think of any questions that others might have a hard time answering?

- How can we make them better?

- Was anything missing?

- You can meet them as a (virtual) group.

Questions?

The slides below include more details… Enjoy!

Few things to keep in mind from survey design research

- Question writing elicits four steps for a respondent
  - Understanding the question and deduce their intent (what are they getting at with this question?)
  - Think back to the experience/thought being elicited
  - Summarize all that comes to mind into a single judgement
  - Write/select answer based on the format of the question
- An Optimizing respondent will follow these steps
- A Satisficing respondent will try for shortcuts

Few things to keep in mind from survey design research…

- From Kroskick and Presser pg266: The likelihood of satisficing is thought to be determined by three major factors:
  - task difficulty,
  - respondent ability,
  - and respondent motivation
- Writing engaging questions (situation based, properly introduced surveys)
- Answer options in Likert scales are useful but…
  - Lower schooling means shorter scales are better
  - Middle point desirable if you have range of individuals who are in or close to the middle (fair representation of opinion)

Few things to keep in mind from survey design research…

- If you have a "Likert" ascending continuum (nothing, a little, some, a lot) consider a continuous scale:

- Example: choose point along the line to show how satisfied you are with your experience at our store. The farther to the left you go, the least satisfied you are, and the more to the right you go, the more satisfied you are:

  ☺_____☹

* To analyze, split the line in as many categories as it makes sense for your sample. Start at 9 (gives you a middle point) and consolidate as needed

Few things to keep in mind from survey design research…

- Acquiescence in Likert scales or Primacy scale: when the answer scale is repeated, respondents pick the same option (extreme satisficing: no cognitive effort at all!)

- Most likely:
  - among low SES respondents
  - Question is unclear
  - Cognitive burden (questionnaire too hard and/or too long)

- Consider splitting the answers: agree or disagree? If agree, would you see extremely or somewhat? Very burdensome, though.

- Consider splitting items (avoid long tables with same scale likert)

Do's and don'ts on how to write the questions

Keep an eye out for:

Double-barrel questions

BAD:

Are the program's duration and content what you expected?

BETTER:

Split into two questions, one for duration and one for content

Keep an eye out for:

Leading questions

BAD:

Do you think your clinician is doing a good job?

BETTER:

Keep your tone neutral:

How would you rate your satisfaction with XX clinician during your last appointment?

Keep an eye out for:

Making assumptions

BAD:

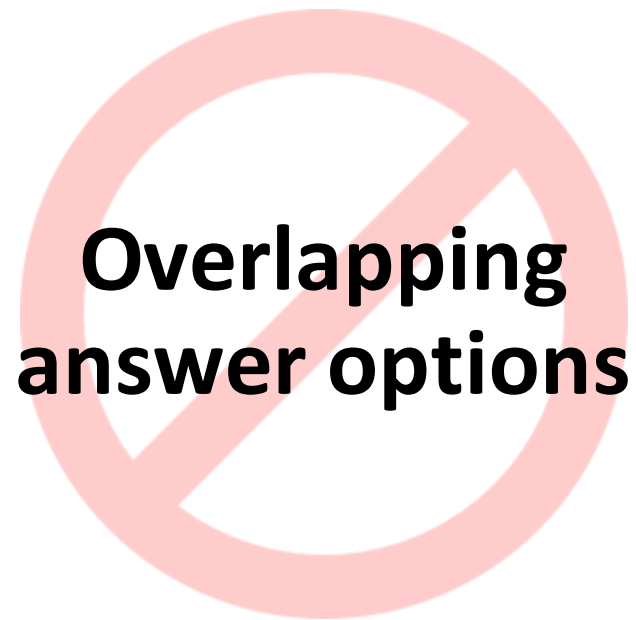How difficult is it for you to show up to appointments? (assumes it is difficult)

BETTER :

Some clients find it difficult to show up to appointments.

Have you had any difficulty showing up to appointments with your provider in the past 30 days?

◯Yes ◯No

If Yes, what was the main difficulty?

Keep an eye out for:

Overlapping answer options

If a person has more than one difficulty getting to the appointment, allow them to mark them

OR

Tell them to pick the biggest challenge

Try for questions that:

Are clear and specific about the subject.

- How did you learn about us? vrs How did you learn about our community garden?

Consider timeframe if you want them to recall something they might do/feel regularly

- How many hours a week did you normally work in the past 3 months?

Focus on positive/action statements.

- Please tell us if you agree or disagree with the following statement:
    - I never take off my safety gear vrs
    - I always wear my safety gear

Are relevant to your evaluation aims (beware of data greediness)

- If in doubt about whether to include a question that sounds *interesting*, go back to your aim and weigh *how* the question would contribute to address it

Feel free to mix Close-ended and Open-ended questions

- When asking participants to report on behavior, **ask for an example**. That will help you assess whether behavior really changed.

- Use open-ended questions sparingly. They provide lots of great material, but can be labor-intensive to analyze.

Artworks survey of classroom teachers

15. Has your participation in ArtWorks increased your integration of the arts into other classroom lessons?

○ Yes

○ No

16. Briefly explain your answer above:

Artworks survey of classroom teachers

88% said that they had increased arts integration,

but only 61% gave examples

Artworks survey of classroom teachers, continued

17. What do you consider to be the most effective aspect of the TA's work with your class?

18. Can you share a story about how a student(s) was changed by their experience with the arts? A quote?

Table 3. Open-Ended Responses Related to ArtWorks Desired Student Outcomes

Using encounters with the arts, students . . .	Teacher response to open-ended questions about Teaching Artist effectiveness, Common Core Standards and student reactions
. . . gain confidence.	I have a student this year who really doesn't speak much. He has a speech impediment and is not comfortable speaking, but now that he has discovered visual art, he loves to come up front and share his work. He still doesn't talk much, but he expresses himself through his drawings and has great pride in his finished work. –Kindergarten Teacher
	I saw the self-confidence of a (lower achieving in literacy) student increase when she was chosen to be in the student Art Show. –1st Grade Teacher
	Every year, I see someone who in the past hardly spoke become animated. It always feels me with joy to see one of my students reveal another part of themselves. –3rd Grade Teacher