



The News **UpFront**

The Newsletter of UpFront Organization Development Consulting

SURVEY RESEARCH—METHODS AND PRACTICES

UpFront has many years of experience designing and conducting successful survey projects.

Here are some elements and practices that are often used in survey research projects.

Research design

The researchers meet with the client to draft an overall objectives statement for the research, and learn about the client organization, objectives, environment, etc.

Sample

Samples may be as simple as a listing from a client's database, or so complex that they are purchased from national sampling firms.

No matter the source, most sampling techniques have a single goal: to insure that each person in the universe (all those eligible to participate in the survey) have an equal chance of being selected.

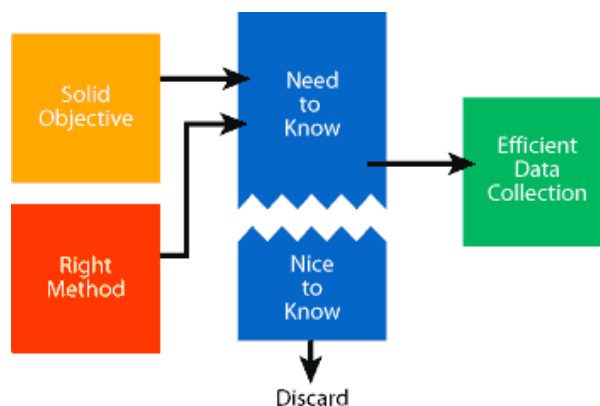
Most often, a simple random sample is

used. A stratified sample is also common. This is used to gather additional responses from sub-groups that would be under-represented in a simple random sample. Data from the stratified sample is often "corrected" through a weighting procedure during analysis.

Participant selection

Within households or organizations, screening procedures in the survey introduction aid random selection. For example, in a household survey, the interviewer or questionnaire might ask for the individual 18 years of age or older who has the most recent birthday. This method obtains a relatively equal mix of male and female participants, and a mix of age groups proportional to the actual population.

This method of selection is preferable to the "head of household" method often used. Asking for "head of household" results in



over-representation of seniors and males. Head of household is increasingly ineffective as non-traditional households—where two or more generations live together—become more common.

Question design

The researchers draft a sample questionnaire, based on the approved objectives. Typically, two or three rounds of revisions are made by the client and by the researchers before the instrument is finalized.

Survey testing

The researchers test the instrument, usually with individuals chosen at random from the overall sample. After the tests are completed, the project director debriefs the test subjects (and, if it is an administered survey, the interviewers) to determine final questionnaire revisions.

Administration

If the survey is administered, interviewers attend a two to four-hour initial training session. The session includes extensive practice with the questionnaire, as well as an overview of the client organization and the objectives of the project.

For all types of surveys, the researchers contact respondents many times. In telephone surveys, interviewers call respondents up to ten times before abandoning that survey. In mail surveys, a typical schedule includes a pre-survey postcard, the survey package (including a cover letter, questionnaire and business reply envelope) and one or two post-survey reminders. Reminder phone calls and/or re-mailing of the entire survey package are often used as well.

UpFront has strong working relationships with a number of subcontractors to administer surveys. These include mailing houses, telephone interviewing firms, and Internet survey providers.

Verification

For telephone surveying, quality assurance staff verifies a percentage of completed interviews in real time during each shift. Some interviewing firms also perform callbacks to insure quality.

For mail surveys, the verification method is often passive. For example, coding the survey forms is typical. This verifies the identity of the respondent, insures against duplicate responses from the same individual, and allows re-contacting those who don't respond.

Data entry

Data entry is usually done in a database program. These programs contain methods for reducing data entry errors. For example, most programs can restrict entry to a specific set of response choices, can auto-enter repetitive information, and can correct problems with questions that were missed or should have been skipped and weren't.

Analysis

Researchers use statistical software—such as SPSS—for data analysis. After verifying the accuracy of the data, the researchers usually prepare count and frequency tables of all data, along with banner tables for comparing responses of subgroups. Standard tests are used to determine whether differences between subgroups are statistically significant or could have occurred by chance. Other methods are described in the analysis plan, usually delivered with the final draft of the questionnaire.

Reporting

The final report is often graphical—charts and tables are used extensively, along with short narrative sections to more fully explain results. The report typically contains a one-page executive summary, a section explaining the research methodology, and a separate discussion of each grouping of questions. The researchers usually

draw conclusions and make recommendations. An appendix collects supporting materials.

The researchers then meet with the client project team. First, this meeting makes sure staff fully understand the findings and can request further analysis. Secondly, it allows staff to react to the data and begin planning how to put the findings to use.

In addition to the report, data is often prepared as a PowerPoint presentation. Reports themselves can be distributed electronically as pdf or PowerPoint files, or converted to files suitable for posting on internal or external web sites.

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About UpFront

UpFront is an organization development consulting firm located in Saint Joseph, Minnesota. We provide organization development, program evaluation and research services. Our company is a partnership between owners Dianne Tuff and Murdoch Johnson—and UpFront's clients.

Our Mission

To help and support teams, organizations and communities as they merge past experience, present strengths and future dreams to create positive change.

Our Vision

UpFront works with progressive, socially-responsible organizations on projects that challenge us and build on our strengths. We strive for balance between the professional and personal—and we integrate our personal values into our professional lives.