



Effective Client Surveys

Leslie Carlson

Overview of Workshops

- First workshop: **Logic Models and Measurement**
- Today: **Effective Client Surveys**
- November 1: **How to use Excel to Analyze Data**

Today

- Introductions
- Brief review about logic models
- Know what is important to measure
- Tips for writing survey questions
- Strategies to maximize survey participation
- Ethics
- Data collection

Logic Model



A diagram that shows how your program is supposed to work

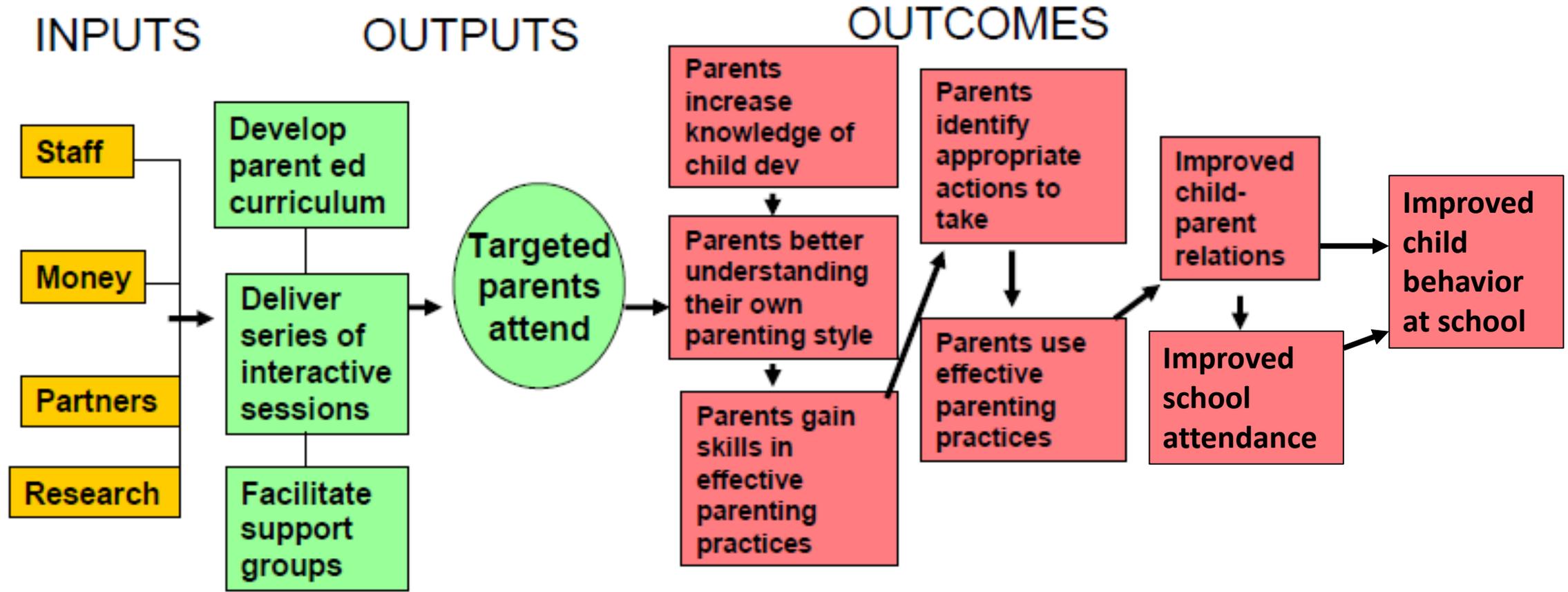
- Specifies program activities
- Shows how activities reach target populations
- List short, intermediate, and longer term outcomes
- Shows causal linkages

Logic Model

Useful for:

- Predicting critical elements for program success.
- Shows key outputs and outcomes to measure
- Helpful in diagnosing the source of problems and successes.

Example: Parenting Education Logic Model



Two things not directly shown in many logic models

- **Program Fidelity** – was the program implemented as intended? Did staff or volunteers consistently follow the service delivery plan?
- **Participant Satisfaction**

Ways to measure things in the logic model

Service Records

- Sign-in sheets
- Case notes

Observation

- Take photos
- Use checklists

Other records

- School records
- Law enforcement data

Written survey

- Paper
- Online

Interviews

- Individual; group
- In-person
- Phone

Today: Effective Client Surveys

What is meant by “Survey”?

During the time you have received services from this program:

3. Was staff flexible with you when scheduling visits?
 - Never
 - A few times
 - Most of the time
 - Always
4. When you needed to contact a staff member, were you able to reach her within 1 – 2 days?
 - Never
 - A few times
 - Most of the time
 - Always
5. Did staff listen carefully to you?
 - Never
 - A few times
 - Most of the time
 - Always



Survey Instrument or Questionnaire

During the time you have received services from this program:

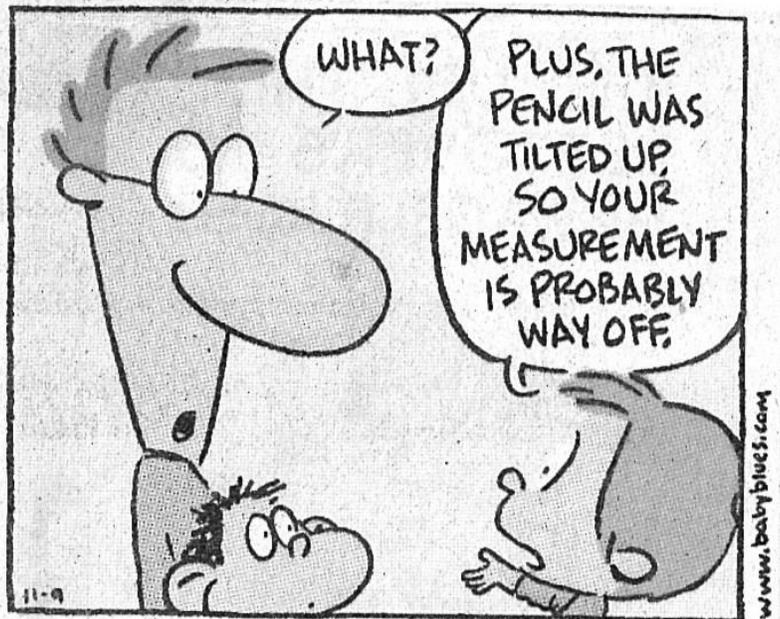
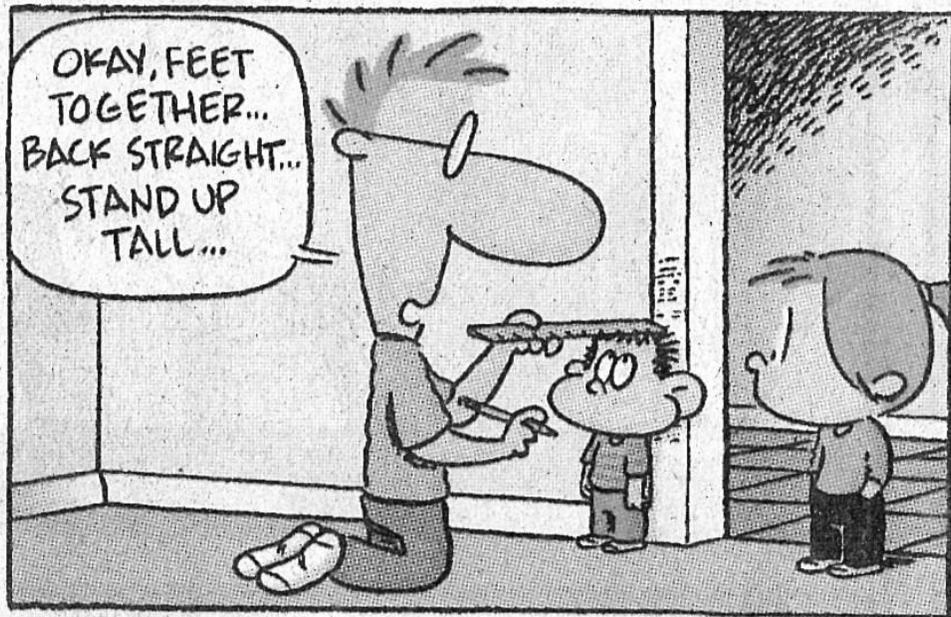
3. Was staff flexible with you when scheduling visits?
 - Never
 - A few times
 - Most of the time
 - Always

4. When you needed to contact a staff member, were you able to reach her within 1 – 2 days?
 - Never
 - A few times
 - Most of the time
 - Always

5. Did staff listen carefully to you?
 - Never
 - A few times
 - Most of the time
 - Always

Conducting a Survey





Rick Kirkman &
Jerry Scott
Baby Blues

First Rule

- ★ **Know what is important to measure and why.**
 - Have a clear idea about each concept or topic that you want to measure.
 - It may be helpful to write these as evaluation questions.

Know what is important to measure.

★ Have a measurement plan.

- Trying to capture information about one point in time?
- Trying to measure change between two points in time?

Trying to capture information about one point in time.

Examples:

- How many people in this neighborhood use a bicycle to commute to school or work?
- Were the participants who came to this program in March 2018 satisfied with services?

Trying to measure change between two points in time.

Examples:

- What were participants' knowledge and attitudes before exposure to the program? Did knowledge and attitudes change after completing the program?
- How many people in this neighborhood used a bicycle to commute to school or work in 2018 compared to 2008?

Trying to measure change between two points in time.

- What will be the time period for the first measurement?
For the second measurement?
- What indicators will be use to compare change between Time 1 and Time 2?
- What analysis metrics will be used to detect change?
- These questions will help as you design survey questionnaires.

Today's Focus: Effective Surveys

★ Know what you want to measure

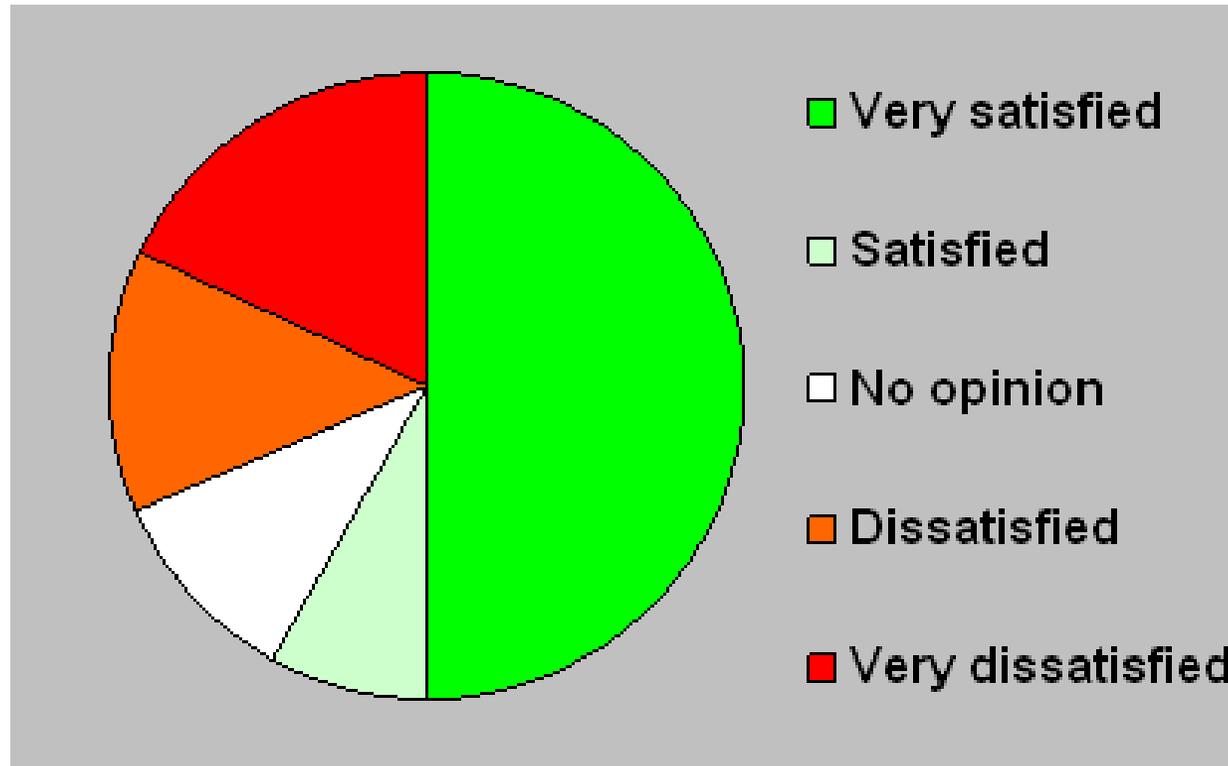
Example:

Parenting Education Program

They wanted to measure *participant satisfaction*.

- This would be measured at one point in time, after participants completed the program.

“I am satisfied with the Parenting Education workshops.”



Know what you want to measure

- Define the concept for the purpose of measurement
 - “Operationalizing the concept”
- What are some ways to define *participant satisfaction*?

Another Example

Las Palomas program

- A (fictitious) rural community in Arizona
- They wanted to provide more positive activities for local youth
- Goal was to reduce negative behaviors and juvenile criminal offenses.

Las Palomas Logic Model

INPUTS	ACTIVITIES	OUTPUTS	Short Term OUTCOMES	Medium Term OUTCOMES	Long Term OUTCOMES
<p>School facilities</p> <p>Church facilities</p> <p>Volunteers</p>	<ul style="list-style-type: none"> • Plan and schedule activities. • Recruit & train volunteers. • Market activities to youth. • Hold scheduled activities. • Collect data 	<p>Schedule of activities.</p> <p>Trained volunteers</p> <p>Marketing materials distributed.</p> <p>Youth attend activities.</p> <p>Database of records</p>	<p>Youth spend time in positive activities.</p> <p>Youth make friends with positive peers.</p> <p>Youth have ties to positive adults.</p>	<p>Adults mentor youth.</p> <p>Youth & adults create youth-led leadership teams for activity areas.</p> <p>Increased youth engagement with school & community.</p>	<p>Reduced # of:</p> <p>School referrals</p> <p>Teen crimes</p> <p>Teen arrests</p> <p>Teen pregnancies</p>

Las Palomas Logic Model

INPUTS	ACTIVITIES	OUTPUTS	Short Term OUTCOMES	Medium Term OUTCOMES	Long Term OUTCOMES
<p>School facilities</p> <p>Church facilities</p> <p>Volunteers</p>	<ul style="list-style-type: none"> Plan and schedule activities. Recruit & train volunteers. Market activities to youth. Hold scheduled activities. Collect data 	<p>Schedule of activities.</p> <p>Trained volunteers</p> <p>Marketing materials distributed.</p> <p>Youth attend activities.</p> <p>Database of records</p>	<p>Youth spend time in positive activities.</p> <p>Youth make friends with positive peers.</p> <p>Youth have ties to positive adults.</p>	<p>Adults mentor youth.</p> <p>Youth & adults create youth-led leadership teams for activity areas.</p> <p>Increased youth engagement with school & community.</p>	<p>Reduced # of:</p> <p>School referrals</p> <p>Teen crimes</p> <p>Teen arrests</p> <p>Teen pregnancies</p>

Know what you want to measure

School Engagement

How to define this?

How to measure this?



GOOD NEWS!

**No need to reinvent
the wheel.**

**How have other people
done this?**

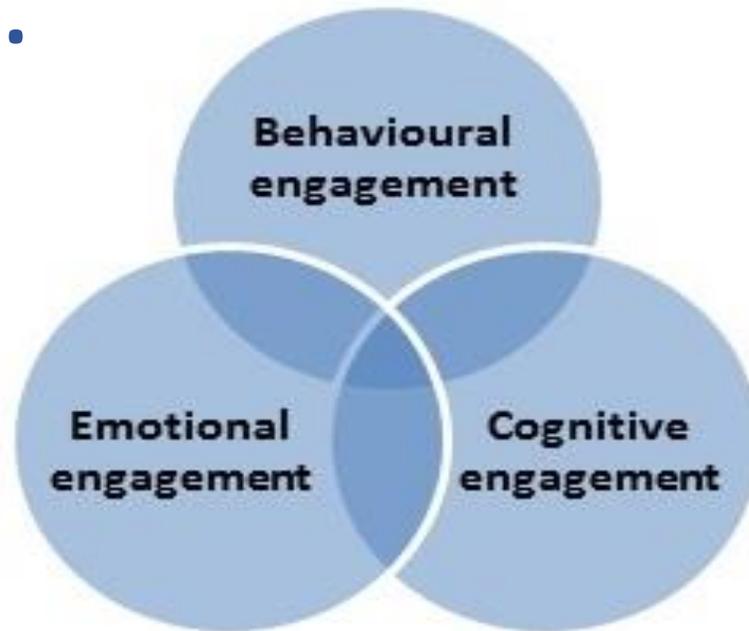
School Engagement

Are there academic fields where this concept might already be defined?

- Find collaborators with expertise who can help you.
- Google – use the internet!
- Ask other practitioners.

School Engagement

Las Palomas planners found some great information.



Resources – School Engagement

- **National Center for School Engagement.**
- **National Center for Educational Evaluation and Regional Assistance**
- **Youth.gov**

Measuring School Engagement

ISSUES & ANSWERS REL 2011-No. 098

REL
SOUTHEAST
Regional Educational Laboratory
At SERVE Center UNC, Greensboro

Measuring student engagement in upper elementary through high school: a description of 21 instruments



TABLE 2

Dimensions of engagement assessed by instruments

Instrument	Behavioral	Emotional	Cognitive
Student self-reports			
Multidimensional			
4-H Study for Positive Youth Development: School Engagement Scale (4-H)	✓	✓	✓
High School Survey of Student Engagement (HSSSE)	✓	✓	✓
Motivation and Engagement Scale (MES)	✓	✓	✓
School Engagement Measure (SEM)-MacArthur	✓	✓	✓
Student School Engagement Survey (SSES)	✓	✓	✓
Bidimensional			
Attitudes Towards Mathematics Survey (ATM)	✓		✓
Education versus Disaffection with Learning (EvsD), student report	✓	✓	
Research Assessment Package for Schools (RAPS), student report	✓	✓	
School Success Profile (SSP)	✓	✓	
Student Engagement Instrument (SEI)		✓	✓
Unidimensional			

High School Survey of Student Engagement

Thank you for your participation in this survey! **Engagement** is a term often used to mean "**involvement**" or "**participation**." Your responses, along with responses from other students, will help your school better understand your needs as a student in order to create a school environment that is engaging, challenging, and productive for you. Please answer thoughtfully and honestly - we appreciate the time and energy you put into this survey.

This survey is administered by the Center for Evaluation and Education Policy, 1900 East Tenth Street, Bloomington, Indiana, 47406.



Marking Instructions

- Use black or blue pen or a number 2 pencil.
- Make dark marks that fill the oval completely.
- Do not use pens with ink that soaks through the paper.
- Make no stray marks.
- Fill in only one response per question, except where indicated.



1. What is your current grade? 9th 10th 11th 12th

2. Select the highest level of education you expect to complete

- | | |
|---|---|
| <input type="radio"/> Will not finish high school | <input type="radio"/> Community college degree (Associate's), technical school, or vocational/trade certificate |
| <input type="radio"/> GED | <input type="radio"/> Four-year college degree (Bachelor's) |
| <input type="radio"/> High school diploma | <input type="radio"/> Master's, Doctorate, or other advanced degree |

3. What is your sex? Male Female

High School Survey of Student Engagement

Thank you for your participation in this survey! **Engagement** is a term often used to mean "**involvement**" or "**participation**." Your responses, along with responses from other students, will help your school better understand your needs as a student in order to create a school environment that is engaging, challenging, and productive for you. Please answer thoughtfully and honestly - we appreciate the time and energy you put into this survey.



This survey is administered by the Center for Evaluation and Education Policy, 1900 East Tenth Street, Bloomington, Indiana, 47406.

Marking Instructions

- Use black or blue pen or a number 2 pencil.
- Make dark marks that fill the oval completely.
- Do not use pens with ink that soaks through the paper.
- Make no stray marks.
- Fill in only one response per question, except where indicated.



1. What is your current grade? 9th 10th 11th 12th

2. Select the highest level of education you expect to complete

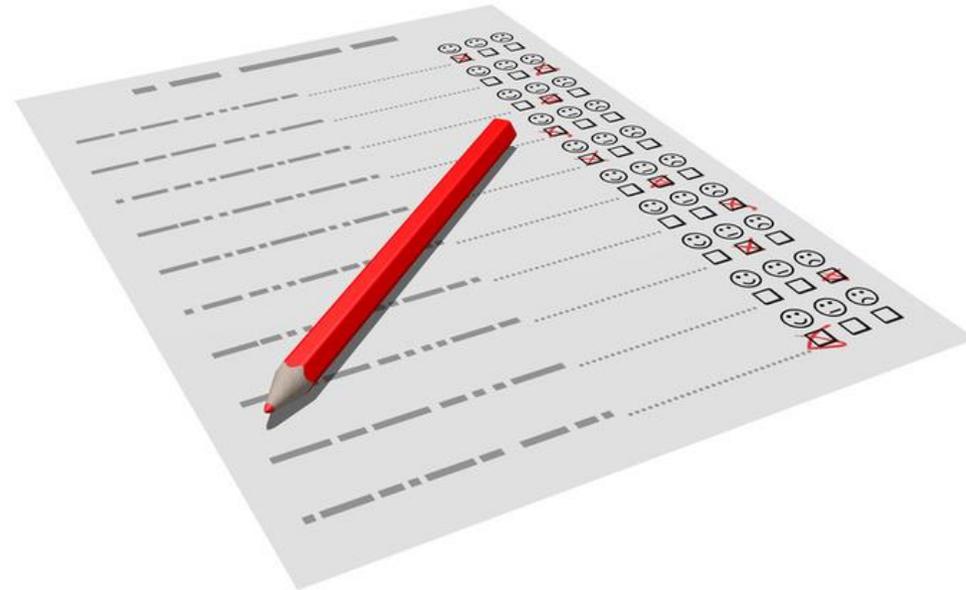
- | | |
|---|---|
| <input type="radio"/> Will not finish high school | <input type="radio"/> Community college degree (Associate's), technical school, or vocational/trade certificate |
| <input type="radio"/> GED | <input type="radio"/> Four-year college degree (Bachelor's) |
| <input type="radio"/> High school diploma | <input type="radio"/> Master's, Doctorate, or other advanced degree |

3. What is your sex? Male Female

Use good quality measurement tools

- **Validity**
- **Reliability**

Tips for Writing Effective Survey Questions





Make sure questions are clearly worded

- Be precise about what you want to know.
- Avoid vague language or jargon
- Help the respondent focus on the time or place you are asking about.

Examples

Less effective

My child comes to this program

- Often
- Sometimes
- Rarely
- Never

More effective

In the past 30 days, my child has attended the FUN4Kids program

- 0 times
- 1 time
- 2-5 times
- 6 times or more

Examples

Less effective

I have improved health because of the Seniors Together program.

- Strongly agree
- Agree
- Disagree
- Strongly disagree

More effective

I walk or do other aerobic exercise at least 4 hours per week.

- Always
- Sometimes
- Rarely
- Never



Avoid asking two things in one question.

- This can be confusing for respondents.
- One thing can be true but not the other.
- You get inconclusive data

Examples

Less effective

Staff members were patient and helpful.

- Strongly agree
- Agree
- Disagree
- Strongly disagree

More effective

Staff members were patient when explaining information.

- Strongly agree
- Agree
- Disagree
- Strongly disagree



Keep questions objective.

- Don't ask leading questions.

Examples

Less effective

Do you agree that the drinking age should be lowered to age 18?

- Yes
- No
- Undecided

More effective

What should be the minimum legal age to drink alcohol?

- 17
- 18
- 19
- 20
- 21
- No age restriction



Use language that is a good fit for the respondents.

- Appropriate for age and education level.
- Avoid awkward syntax and unnecessary big words.
- Reflects culture and traditions of respondents.
- Do you need to translate the survey to another language?

Examples

Less effective

The information was instrumental in helping me access services

- Strongly agree
- Agree
- Disagree
- Strongly disagree

More effective

The information helped me learn how to use services.

- Strongly agree
- Agree
- Disagree
- Strongly disagree



Use response options that fit the question.

Examples

Less effective

I was seen on time.

- Strongly agree
- Agree
- Disagree
- Strongly disagree

Better

I was seen on time.

- Yes
- No

Examples

Even Better

I was seen within 15 minutes of my appointment time.

- Always
- Sometimes
- Rarely
- Never



Don't use response options that are tilted toward "good."

- Likert-type options should be symmetrical.

Examples

Non-symmetrical

Please rate the quality of the fruit in today's food box.

- Excellent
- Very Good
- Good
- Fair
- Poor

More Symmetrical

Please rate the quality the fruit in today's food box.

- Excellent
- Good
- Fair
- Poor



Some questions may not apply to everyone.

- Think about this possibility for every question.
- When possible, try to avoid addressing this with a “Not Applicable” answer option.
 - Sometimes people will select this answer when the question does apply to them but they want to evade making a choice.

Examples

Is there a bus stop within a five-minute walk from the program site?

- Yes
- No

If you take the bus, is there a bus stop within a five-minute walk from the program site?

- Yes
- No



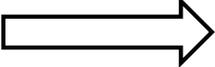
Skip Patterns

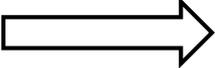
An initial question

- serves as a screening question.
- can also give you useful data on its own.

Example

5. Do you ever take the bus to come to the program site?

No  If no, skip to Question 7.

Yes  If yes, continue to Question 6.

6. Is there a bus stop within a five-minute walk from the program site?

No

Yes



Think about analysis as you write questions.

- How would you like to report on this topic?
Percentages? Numeric ranges? An average?
- This tells you how to structure the question and the response options.
 - Numeric
 - List of mutually exclusive options
 - List of options – check all that apply
 - Likert



Field test the survey

- Identify some individuals who are similar to the intended respondents and ask them to complete the survey.
 - Get feedback afterward.
- Don't use real respondents.
- If you have a translation, test that too.

BREAK

Practice

- Form groups of three.
- Review the examples on the handout.
- Can these questions be improved in some way?



More about effective surveys

But first...



A topic that came up last time:

Retrospective Pretest

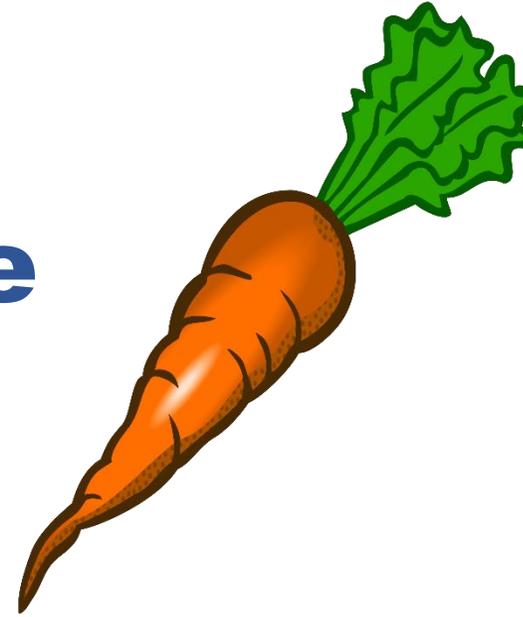
Measurement plan

- Measuring change
- Pre-test / Post-test
- Problem: when you can't use a pre-test measurement.

Retrospective Pre-Test

- When you have a pre-post design, but it's not feasible to get a baseline measurement before the intervention starts.
- When a pre-test measurement might be inaccurate.
 - “Response shift bias”

How to Motivate People to Complete Surveys



Use multiple strategies

★ A high response rate increases the credibility of your findings.



Keep the questionnaire brief

- Don't ask questions unless you are sure that you will use the information.
- Ask questions because they are necessary, not because they might be interesting.
- If you ask demographic questions, ask only the ones that are important.



Language comfort and familiarity

- Respondents might be more willing to complete a survey in their first language.
- If you do a translation:
 - Use a professional translator.
 - Make sure the translator is fluent in the locally-spoken version of the language.



Question order

- Use a logical flow of questions.
- Ask easy questions first; ask sensitive questions later on.



Visually appealing

- Easy to read font size and type.
- Use effective formatting – bold, italics, borders, etc.
- Use formatting to encourage a response and to ensure correct selection of answer options.

Formats for answer options

Less effective

What is your current grade in school?

6th grade 7th grade 8th grade 9th grade 10th grade

Formats for answer options

More effective

What is your current grade in school? *(select one answer)*

- 6th grade
- 7th grade
- 8th grade
- 9th grade
- 10th grade

Formats – Matrix questions

- A series of questions that use the same set of answer options.
- Arrange these in a grid.
- Use shading for ease of reading across rows.

During the time you have been in this program:	Always	Most of the time	A few times	Never
Did THRIVE provide a welcoming environment?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did staff explain things in a way you could understand?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When you needed to contact a staff member, were you able to reach her/him within 1 – 2 days?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did staff respect your ethnic and cultural background?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

How much <u>new information</u> did you learn from the financial education services?	A lot	Some	A little bit	None	Did not receive this
Financial counseling provided by your Case Manager.	<input type="checkbox"/>				
Financial Education Class.	<input type="checkbox"/>				



Know your respondents

Where to reach them; what they will relate to.

- Paper and pencil survey?
- Internet? For example, Survey Monkey.
- Tablet or phone?



Use incentives to sweeten the deal





Use reminders

- Continue to offer incentives!

Survey Ethics

- 1. Participation is always a choice**, not a requirement for getting services.
 - Do not use incentives in a way that might be coercive.
 - Ensure that respondents have given **informed consent** to participate.
 - Parents must give consent for minors under age 18.

Survey Ethics

2. Anonymity

- Protect the identity of respondents.
- When possible avoid using names.
 - Anonymous surveys
 - Unique identifier codes instead of names
 - If you have names, leave them out of data that is shared and reported
- Ensure that reported data don't allow identities to be deduced

Survey Ethics

3. Confidentiality

- Paper surveys – identify a place for respondents to return completed surveys that will protect their identity and information.
- Ensure that staff and volunteers involved with surveys sign agreements to protect respondent information.

Survey Ethics

4. Data Security

- Have a secure location for paper and electronic surveys. Make sure staff store surveys in this location and know how to maintain security.

Survey Administration

Have a written plan

- What survey instruments to use.
- When to use them
- Where to put completed surveys

Train and monitor staff or volunteers

- Refer to written instructions.
- Ensure adherence to privacy and confidentiality



Thank you