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

**INPUTS**
- Staff
- Money
- Partners
- Research

**OUTCOMES**

**TARGETED PARENTS ATTEND**
- Develop parent ed curriculum
- Deliver series of interactive sessions
- Facilitate support groups

**OUTPUTS**
- Parents increase knowledge of child dev
- Parents identify appropriate actions to take
- Parents use effective parenting practices
- Parents better understand their own parenting style

**OUTCOMES**
- Improved child-parent relations
- Improved school attendance
- Improved child behavior at school
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

<table>
<thead>
<tr>
<th>Service Records</th>
<th>Written survey</th>
<th>Interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Sign-in sheets</td>
<td>• Paper</td>
<td>• Individual; group</td>
</tr>
<tr>
<td>• Case notes</td>
<td>• Online</td>
<td>• In-person</td>
</tr>
<tr>
<td><strong>Observation</strong></td>
<td></td>
<td>• Phone</td>
</tr>
<tr>
<td>• Take photos</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Use checklists</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Other records</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• School records</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Law enforcement data</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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

Conducting a 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
Okay, feet together... back straight... stand up tall...

Wow, Hammie! You've grown an inch!

Or not.

Huh?

You were holding the ruler crooked.

What?

Plus, the pencil was tilted up, so your measurement is probably way off.

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.
<table>
<thead>
<tr>
<th>INPUTS</th>
<th>ACTIVITIES</th>
<th>OUTPUTS</th>
<th>Short Term OUTCOMES</th>
<th>Medium Term OUTCOMES</th>
<th>Long Term OUTCOMES</th>
</tr>
</thead>
</table>
| School facilities | • Plan and schedule activities.  
• Recruit & train volunteers.  
• Market activities to youth.  
• Hold scheduled activities.  
• Collect data | Schedule of activities.  
Trained volunteers  
Marketing materials distributed.  
Youth attend activities.  
Database of records | Youth spend time in positive activities.  
Youth make friends with positive peers.  
Youth have ties to positive adults. | Adults mentor youth.  
Youth & adults create youth-led leadership teams for activity areas.  
Increased youth engagement with school & community. | Reduced # of:  
School referrals  
Teen crimes  
Teen arrests  
Teen pregnancies |
| Church facilities | Volunteers | | | | |

Las Palomas Logic Model
## Las Palomas Logic Model

<table>
<thead>
<tr>
<th>INPUTS</th>
<th>ACTIVITIES</th>
<th>OUTPUTS</th>
<th>Short Term OUTCOMES</th>
<th>Medium Term OUTCOMES</th>
<th>Long Term OUTCOMES</th>
</tr>
</thead>
</table>
| School facilities | • Plan and schedule activities.  
• Recruit & train volunteers.  
• Market activities to youth.  
• Hold scheduled activities.  
• Collect data | Schedule of activities.  
Trained volunteers  
Marketing materials distributed.  
Youth attend activities.  
Database of records | Youth spend time in positive activities.  
Youth make friends with positive peers.  
Youth have ties to positive adults. | Adults mentor youth.  
Youth & adults create youth-led leadership teams for activity areas. | Reduced # of:  
School referrals  
Teen crimes  
Teen arrests  
Teen pregnancies |
| Church facilities | Volunteers | |
| Volunteers | | | | | |
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

Measuring student engagement in upper elementary through high school: a description of 21 instruments
<table>
<thead>
<tr>
<th>Instrument</th>
<th>Behavioral</th>
<th>Emotional</th>
<th>Cognitive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student self-reports</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multidimensional</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4-H Study for Positive Youth Development: School Engagement Scale (4-H)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>High School Survey of Student Engagement (HSSSE)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Motivation and Engagement Scale (MES)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>School Engagement Measure (SEM)-MacArthur</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Student School Engagement Survey (SSES)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Bidimensional</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attitudes Towards Mathematics Survey (ATM)</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Education versus Disaffection with Learning (EvsD), student report</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Research Assessment Package for Schools (RAPS), student report</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>School Success Profile (SSP)</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Student Engagement Instrument (SEI)</td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Unidimensional</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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
   - Will not finish high school
   - GED
   - High school diploma
   - Community college degree (Associate's), technical school, or vocational/trade certificate
   - Four-year college degree (Bachelor's)
   - 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
   ○ Will not finish high school ○ Community college degree (Associate’s), technical school, or vocational/trade certificate
   ○ GED ○ Four-year college degree (Bachelor’s)
   ○ High school diploma ○ 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
Another approach

Please rate the quality of the fruit in today’s food box by circling a number, where 1 is poor and 5 is excellent.

1  2  3  4  5
Poor  So-So  Excellent
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”
### Example of Retrospective Pre-Test

**Measuring Knowledge Indicators for Parenting Education**

For each of the topics below, check the box below the number that matches your level of knowledge both before and after completing the Parenting Education workshops.

1 – None. Have no knowledge of this topic
2 – Low. Know very little about this topic
3 – Moderate. Have some basic knowledge; there is more to learn.
4 – High. Very knowledgeable about this topic.

<table>
<thead>
<tr>
<th>Rate your knowledge about the following topics:</th>
<th>Knowledge Before the Class</th>
<th>Knowledge After the Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>Redirecting a toddler from unsafe to safe activities.</td>
<td>1 2 3 4</td>
<td>1 2 3 4</td>
</tr>
<tr>
<td>Appropriate discipline for a five year old who misbehaves.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective ways to monitor your teenager.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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)*

- 6\textsuperscript{th} grade
- 7\textsuperscript{th} grade
- 8\textsuperscript{th} grade
- 9\textsuperscript{th} grade
- 10\textsuperscript{th} 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.
<table>
<thead>
<tr>
<th>During the time you have been in this program:</th>
<th>Always</th>
<th>Most of the time</th>
<th>A few times</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did THRIVE provide a welcoming environment?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Did staff explain things in a way you could understand?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>When you needed to contact a staff member, were you able to reach her/him within 1 – 2 days?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Did staff respect your ethnic and cultural background?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>How much new information did you learn from the financial education services?</th>
<th>A lot</th>
<th>Some</th>
<th>A little bit</th>
<th>None</th>
<th>Did not receive this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial counseling provided by your Case Manager.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Education Class.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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