Designing a Customer Survey Instrument

Part 2 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

3-Part Webinar Series
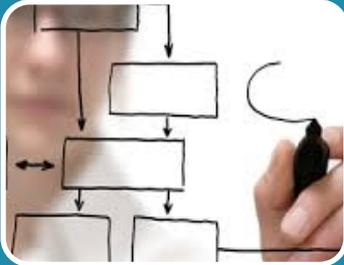
Planning a Customer Survey

- 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

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Takeaways from Webinar 1

- 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.

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Overview of this Webinar

- Instrument design

- Item development

- Pilot testing

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3 Steps to Designing a Survey Instrument

Identify the Objectives

- Start with the overall goal for the survey
- Then identify specific and measureable objectives

Determine the Content

- What information do you need to know?
- How well will the information help meet the objectives?
- What type(s) of questions will provide the information needed?

Construct the Instrument

- Design of the instrument
- Item and response development
- Pretesting the instrument

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Instrument Design

- In drafting the instrument, a survey should

    – be short, concise, and clearly worded

    – be relevant and specific to the topic

    – avoid unnecessary modifiers, especially absolutes (e.g. always, never, etc.)

    – be gender, culturally, or ethnically neutral

    – be jargon free in both questions and response options (e.g., avoid technical, complex terminology)

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Survey Length

- In general, keep your survey short

- Mention the time commitment up front

- Vary the types of questions to keep it interesting

- Introduce each change in the topic covered

- Include only those questions that will provide you with critical information and remove everything else

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Survey Format

- Include a title that is easily understood and reflective of the survey content

- Ask one question per line and number them sequentially throughout the survey

- Provide response instructions for each group of questions (e.g., "Check all that apply")

- <u>Underline</u>, *italicize*, or **bold** important terms so respondents pay attention to them

- If you plan to use and analyze data from open questions, provide enough space for responses or comments

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Sample Survey Formats

1. How did you hear about this webinar? (Check all that apply.)

❑ Email blast

❑ Newsletter ad

❑ Colleague

❑ Twitter

❑ Facebook

❑ Other, specify _____

2. How relevant to your work was the content of the webinar? (Check one.)

❑ Very relevant

❑ Somewhat relevant

❑ Not relevant

3. What topics related to <u>high school completion and reentry</u> would you like covered in future webinars?

_____

_____

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Survey Introduction

- The survey instrument should start with brief introduction that includes

  - Who you are and what is the purpose of the survey

  - How and why the respondent was selected

  - Benefits to the respondent and your organization or program

  - Information about confidentiality (e.g., anonymity)

  - Explanation of how data will be used and kept secure

  - Information about incentives (if you offer them)

  - Contact information for help with questions

  - Time estimate for completing the survey

  - Instructions on how and when to submit the completed survey

  - An expression of your appreciation for the respondent's participation

Question and Response Order

- All items should be ordered in a logical way and flow smoothly from one to the next

- Response choices should follow a natural order

- Start with an easy or interesting question

- The most important questions should be placed early in the survey; the most difficult or sensitive should come last

- Group together questions about the same topic or with the same response scale

Survey Layout

- Keep the survey instrument simple and uncluttered

- Repeat headers of grid or matrix questions (e.g., questions with response options in a table format) on any new pages

- Number questions/survey items and pages

Item Development: What type of items to use?

- Open or Unstructured Format

  - Respondent provides answer in his or her own words

- Closed or Structured Format

  - Respondent selects from predetermined, structured response options

- Mixed Format

  - Respondent selects from predetermined, structured response options and also has the opportunity to provide more information in his or her own words.

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Advantages & Disadvantages of Item Types

Type	Advantages	Disadvantages
Open or Unstructured Format	Allows respondents to more freely express themselves	Respondents may find it difficult to express their thoughts
	Responses are richer and more descriptive	Requires more time and effort from respondents to answer questions
	Allows for greater variation in responses	Requires more time and resources to prepare and interpret results
Closed or Structured Format	More time efficient	Can be perceived as leading
	Can collect more responses	Respondent's true choice may not be included in the response alternatives
	Easier to show changes from pre to post	Possible response options may be missing
	Easier to prepare and interpret results	Cannot further explore the meaning of responses

Open/Unstructured Items

- Open items are useful when

  – unthought-of categories are likely to emerge

  – seeking spontaneous or elaborated responses without influence

  – trying to capture new ideas from respondents

  – the list of possible responses would be too long

  – exploring possible response options for future surveys

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Closed or Structured Items

- Closed items are useful when

  – probing is not possible

  – the number of response categories is limited or small

  – the list of possible response categories is known

  – quicker response times are desired

  – the number of respondents is large

  – determination of validity, reliability, and statistical significance is required

Common Problems With Items: Double-Barreled Questions

Example: **How relevant and useful to your work was the content of the conference?**

  a) Very

  b) Somewhat

  c) Not at all

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Common Problems With Items: Leading or Loaded Questions

Example of a Leading Question:

> To what extent do you agree that the information we provide is helpful for improving your knowledge about XYZ?

Example of a Loaded Question:

> Our TA providers work very hard to provide you with the support that you need. How satisfied are you with the intensive technical assistance you received in the past year?

Common Problems With Items: Vague or Negatively Worded Questions

Example of Vague Language:

How often did you visit the XYZ website?

Example of a Negatively Worded Question:

Do you agree or disagree that you would not recommend this workshop to your colleagues?

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Common Problems With Items: Poor Response Categories

Example: Which method do you most prefer we use to notify you about future webinars?

- ○ Email
- ○ Mail
- ○ Twitter

Example: How often did you access our website for information during 2014?

a) 1-3 times per month
b) 3-5 times per month
c) 5-8 times per month
d) 8 times or more per month

Response Options and Scales

- Types of response options

  - Dichotomous

  - Categorical

  - Forced Choice

    - Single Response

    - Multiple Response

  - Ranking

  - Rating

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Dichotomous Responses

- Allow respondents to choose one of two response options

> **Was the content of the webinar relevant to your work?**
> ☐ Yes
> ☐ No

Categorical Responses

- Allow respondents to place themselves into exactly one category

What is the highest level of education you have completed? (*Select one*)

- ☐ Less than High School
- ☐ Some high school, no diploma
- ☐ High school graduate, diploma or equivalent (for example: GED)
- ☐ Some college credit, no degree
- ☐ Trade/technical/vocational training
- ☐ Associate degree
- ☐ Bachelor's degree
- ☐ Master's degree
- ☐ Professional degree
- ☐ Doctorate degree

Single Forced Choice Responses

- Single Responses – Allow respondents to select one of several predetermined response options

The {webinar/conference/seminar/document} assumed a level of knowledge …

(Select one)

☐ Far below my current level

☐ A little below my current level

☐ At my current level

☐ A little above my current level

☐ Far above my current level

Multiple Forced Choice Responses

- Multiple Responses – Allow respondents to choose more than one of several predetermined response options

> **In which of the following areas do you need additional assistance? (*Select all that apply*)**
>
> ☐ Data collection
>
> ☐ Data entry
>
> ☐ Data analysis
>
> ☐ Data reporting

Order of Preference Responses

- Ask respondents to place different items in a list in order of preference or importance

Please rank the information on our website that is most important to you, with 1 being the least important and 4 being the most important.

- ☐ Advocacy
- ☐ Education
- ☐ Treatments
- ☐ Family Support

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Single Rating Responses

- Ask respondents to select a single rating for each question along an equally spaced continuum of possible choices

To what extent do you agree or disagree with the following statements? (*Select one response in each row.*)	Not applicable	Strongly Disagree	Disagree	Agree	Strongly Agree
It is easy to get the accessible instructional materials I need.	☐	☐	☐	☐	☐
I know where to go when I need accessible instructional materials.	☐	☐	☐	☐	☐
If I have trouble finding materials I need, I know where to get help.	☐	☐	☐	☐	☐
I know how to advocate for my child with regard to his/her technology needs.	☐	☐	☐	☐	☐

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Pretesting the Survey

- Pretesting allows you to identify and fix problems prior to full implementation
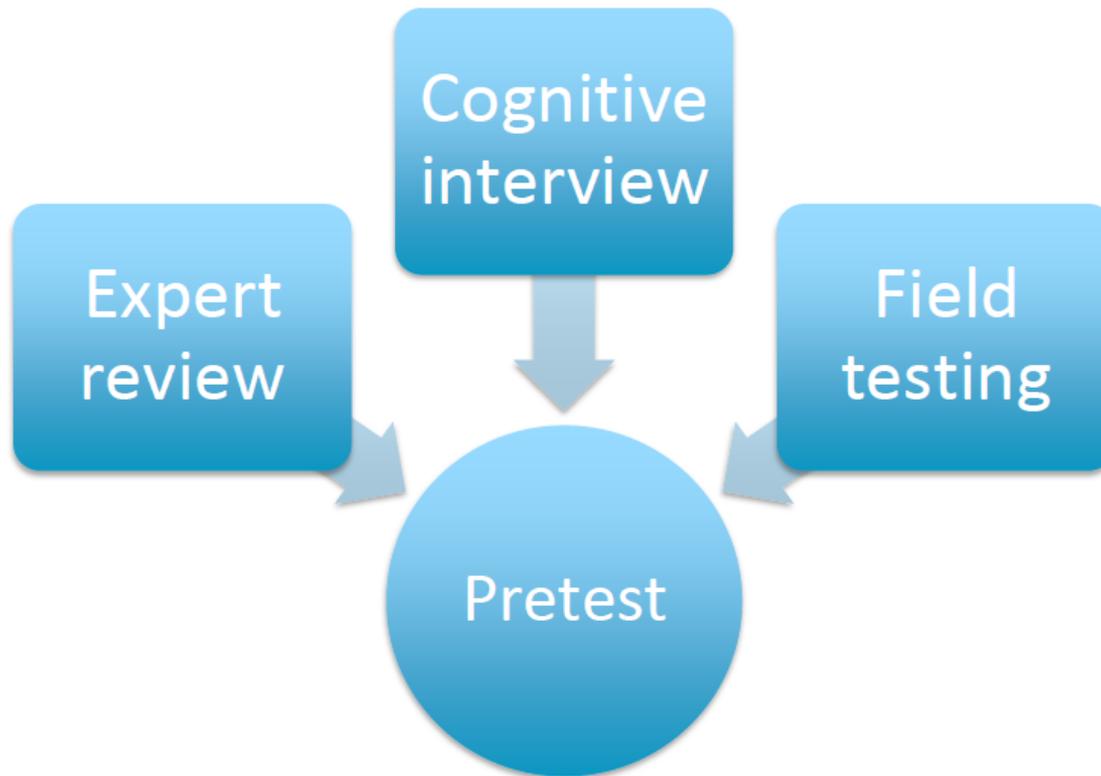
Expert Review

- Two types of Experts

  - Survey experts can make sure the instrument is technically sound and meets best practices in survey research

  - Subject area experts can provide commentary on the content of survey questions and answers to ensure that they meet the objectives of the survey

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Cognitive Interviews

- To identify barriers or problems with questions

- To determine how respondents understand and interpret questions and arrive at answers

- Can be conducted one-on-one or as a focus group

- Two primary methods

  - Think aloud: Interviewer asks participants to talk through their thought process as they respond to survey questions

  - Verbal probing: Interviewer asks the participants questions about their choices during or after their response to a survey item

Field Testing

- Administer the survey to a sample of respondents in order to test:

  - content and wording of survey items and responses

  - length, format, and layout

  - survey administration procedures

  - survey data collection procedures; and

  - survey functionality (for electronic surveys)

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Invite Responses

When you are ready for survey administration, write an invitation asking respondents to complete the survey. If the survey will take more than 10-15 minutes to complete, a pre-notification letter will help improve response rates.

- Personalize the invitation (and pre-notification if there is one).

- Ask an official with the survey's sponsor to sign the invitation (and the pre-notification letter).

- If possible, use sponsor's letterhead or logo on the invitation (and pre-notification letter).

- Make the request salient and inviting.

- Keep it short, but include the same information contained in the introduction to the survey instrument.

- Express appreciation for the respondent's participation.

Takeaways

- Start with the overall goal for the survey and then identify specific and measureable objectives.

- When designing the survey, consider

    - what information you need to know,

    - how well will the information you obtain help you meet the objectives, and

    - what types of questions will provide the information needed.

- Be purposeful in the design of your survey, including the length, format, and item construction.

- Pre-testing is critical for ensuring development of a high-quality survey instrument.

1st and 3rd Webinars in the Series
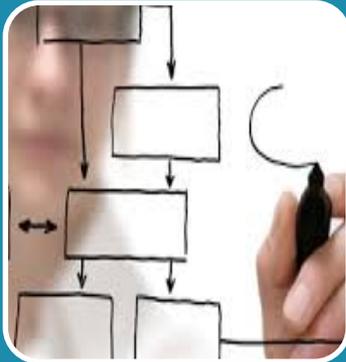
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- Data analysis and use

Additional Resources

- https://www.whatisasurvey.info/

- Fink, Arlene G. 2008. *How to Conduct Surveys: A Step-by-Step Guide*. Thousand Oaks: Sage Publications. http://www.socialresearchmethods.net/kb/survey.php

- Dillman, D., Smyth, J., & Christi, L. (2014). *Internet, Mail, and Mixed-Mode Surveys: The Tailored Design Method*, 4th Edition.

- http://broadeducation.org/resources/guides_and_toolkits.html

Questions?

Contact us:

- Elaine Carlson or Anne D'Agostino

CIPP@westat.com

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