

# Running surveys and consultations

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# Contents

- Five key stages of planning a survey
- Questionnaire design: top tips
- Qualitative research: top tips
- Maximising participation
- Further information

# Planning Process: Five Key Stages



# 1. Identify the objectives of your research



# Objectives

- What information do you need to obtain?
- What are the key questions for which you need responses?
- What decisions will be informed by the responses you receive?

# Points to consider

- Ensure your consultation exercise is appropriate and well planned before asking people to give up their time
- Did you provide feedback to consultees last time you consulted them? Consultees expect you to act on previous responses before asking them again.
- Is a survey the most appropriate way of obtaining the information you need?

## 2. Identify your target audience



# Target audience

- Whose views do you need to canvass?
- Do you need to ask all members of the department / group or just a particular sub-set?
- Will the survey be anonymous or will respondents have the option to leave their contact details?
- What is the best way of reaching your audience (eg online, hard copy)?
- For external audiences, you may want to use a consumer classification tool such as ACORN:  
<http://acorn.caci.co.uk>



### 3. Decide on your research methodology



# Research methodology

## Quantitative research

*Output is numeric*

Used for:

- Canvassing opinions of a large number of people
- Segmenting respondents by group or profile
- Measuring opinion (eg satisfaction with a particular service)
- Common methodologies: online surveys, phone interviews

## Qualitative research

*Output is descriptive*

Used for:

- Gaining an indepth understanding of behaviour, attitudes, opinions and motivations
- Examining issues identified in a quantitative survey in more detail
- Common methodologies: group discussions; depth interviews (individual interview or in pairs)



## 4. Plan an appropriate schedule



# Schedule

- Timescale will depend on the scale of your research and the methodology you employ
- Try to avoid really busy times of year (eg start of term, exams, UG interviews, financial year-end)
- Allow longer response times during the summer
- Consultations: try to avoid starting out of term

# Quantitative research: timeline

<b>Activity</b>	<b>Timeline</b>
Preparation of research proposal and objectives	1 week
Drafting of questionnaire	1 week
Printing of paper questionnaire (if used)	3-4 days
Programming and testing of online questionnaire	1 week (varies by length and complexity)
Survey completion	3 weeks
Data analysis	1 week
Write-up	1 week
<b>Total time required from initial brief to final debrief</b>	<b>8.5 weeks</b>

# Qualitative research: timeline

<b>Activity</b>	<b>Timeline</b>
Preparation of research proposal and objectives	1 week
Recruitment of volunteers	3 weeks (depending on complexity of research and number of volunteers needed)
Design of focus group guide / interview questions	1 week
Preparation, running and analysis of pilot focus group	1 week
Depth interviews / focus groups	2 weeks
Analysis and reporting	1 week
<b>Total time from initial brief to final debrief</b>	<b>9 weeks</b>

## 5. Identify resources





# Resources

- Will you carry out the research and analysis yourself, or do you require an external agency?
- Can you use free survey software (e.g. Bristol Online Survey, Survey Monkey) or will you need to purchase a licence?
- How will you present the results?
- How will the actions that result from the feedback be resourced?

# Questionnaire planning: top tips



Rob Markham:  
Questionnaire Planning  
Tips from the Market Research Society

Step 1  
Be clear  
about your  
objectives

- Be absolutely clear about the **objectives** of the survey
- What **decisions** are you trying to make?
- What information do you **need** to know?




Step 2  
Get ready

- **Review** previous questionnaires
- What **method** are you going to use?
- What has worked well or badly in the past?
- Are there any budgetary considerations?
- How long is the process going to take from start to finish?
- Think about your **audience**...

Step 3  
Get the  
scope  
agreed

- **Brainstorm** – what *could* be included?
- What *could* you ask for each of your objectives?
- Get key **stakeholders** involved
- How will feedback help stakeholders **make decisions**?
- Identify **key questions**, what do you actually want to know?



Step 4  
Get a grip

- Create an **outline** showing the overall structure
- Major structural divide? - consider two questionnaires
- Outline questions – know where your **key questions** are
- Show how each question **links to a specific objective**

Step 5  
Get real

- Now you can start thinking about the **detailed wording**
- Write your **key questions first**
- Think about the **key things** you want to **deliver**

Step 6  
Get it to  
work

- Look at the survey from **different points of view**
- Think about what could potentially be misinterpreted
- **Pilot** the survey
- Use the results to **make improvements**



# Annette Cunningham: Questionnaire Design Tips from the Market Research Society

## **Keep it short:**

- Long surveys get abandoned
- Be brutal – remove any questions that are similar

# Key Questions

- Determine your most important questions and place them early in the survey
- If it's not logical to ask these questions early, consider adding something different (such as a photo question) immediately before them to re-engage your audience

# Style

- Simple language – write how people speak
- Aim for less than ten words in a sentence
- Be very specific – avoid ‘on average...’
- Avoid asking ‘interesting to know’ questions

# To Agree or Disagree

- Ideally the mid-point option should be given, BUT it does tends to be misused
- Consider asking respondents to ‘slightly agree’ or ‘slightly disagree’ instead
- If you really want to use the ‘neither’ option, consider moving from the main list and placing elsewhere on the page

# Best Practice

- Avoid hijacking by colleagues
- Time your survey – allow for 5 closed questions per minute and 1 open question per minute
- Link answers to questions
  - e.g. Do you...
  - Often watch TV after midnight? Sometimes ...?
- Pilot your survey with a group of typical respondents
- Incentives? (Estates Services trialling in 2015)

# You Said – We Did

Staff Forum and four working groups established:

- Communications
- HR Surgeries
- Shadowing Scheme
- Staff Innovation and Suggestion Scheme

# Qualitative research: top tips



# Qualitative research: focus groups

- Up to 2 hours in length
- Usually involve 6-10 people
- Open-ended, discursive sessions, which are used to gain a deeper understanding of respondents' attitudes and opinions
- Respondents are able to interact with, and react to, each other



# Qualitative research: depth interviews

- Conducted with individuals or in pairs
- 45-60 minutes in length
- Face-to-face or over the phone
- Not a rigidly structured interview, they are usually discursive and open ended
- Used to probe responses to gain full understanding of their meanings and / or implications
- More appropriate for handling sensitive topics than focus groups

# Discussion guide

- Prepare a detailed discussion guide in advance
- Pilot your guide with a test group and amend accordingly
- Keep to the same structure and questions for each group
- But, don't administer it like a questionnaire – keep the discussion free-flowing and natural
- Introduce topics in a clear and relevant fashion

# What makes a good moderator?

## Good moderators...

- ✓ Are confident in themselves and with the group
- ✓ Build trust so people are comfortable discussing issues
- ✓ Are good listeners
- ✓ Are non-judgmental
- ✓ Have thought about the questions and answers in advance
- ✓ Are able to manage the group energy levels and dynamics
- ✓ Are in control of the process (and time-keeping)
- ✓ Have a colleague available to record people's comments

# Developing rapport

**Friendly and approachable**

**Not too formal**  
**Address people by their first names**

**Positive body language**

**Communicates acceptance**

**Inclusion**

**Make sure everyone has said something in the first 10 minutes**

**Open and honest**

**Clear, accessible language**

# Active listening skills

## Positive body Language

Make eye contact

Smile

Nod

Lean forward

Face person speaking

## Listen

Don't interrupt

Don't finish sentences

## Demonstrate understanding

Repeat key points

Paraphrase

Identify issues

Capture key points on a flip chart

# Probing to achieve better understanding

**Use words like**

**Why**

**Which**

**How**

**When**

**Who**

**What**

**Elicits reasons for a response**

# Closing remarks

- Thank everyone for their time and contribution
- Recap how the information you have gathered will be used
- If appropriate, temper respondents' expectations:
  - eg “I can't promise that the changes we've discussed today will happen, but we'll be feeding your views into the next round of development.”

# Maximising your response rate





# Ways to encourage participation

- Plan your schedule carefully to avoid survey fatigue
- Test your questionnaire with critical friends
- Explain clearly and concisely how the results will be used and why people should take part
- Reassure respondents that responses will be anonymous and that information will be treated in confidence
- Consider offering an incentive, if appropriate - either personal (eg voucher) or general (eg charity donation)
- Use a multi-channelled approach to promote

# Common pitfalls

- Excessive length of questions
- Repetitive questions
- Insufficient opportunity for respondents to comment
- Excessive personal information sections

# Further information

- Market Research Society guidelines:  
[www.mrs.org.uk/standards/guidelines](http://www.mrs.org.uk/standards/guidelines)
- Bristol Online Surveys (BOS):  
[www.survey.bris.ac.uk/support/survey-design](http://www.survey.bris.ac.uk/support/survey-design)
- BOS administrator for Oxford: Hugo Mireles, IT Services
- Central University Research Ethics Committee:  
[www.admin.ox.ac.uk/curec](http://www.admin.ox.ac.uk/curec)
- Decision flowchart on applying for ethical review:  
[www.admin.ox.ac.uk/media/global/wwwadminoxacuk/localsites/curec/documents/Decision\\_flowchart\\_for\\_CUREC.pdf](http://www.admin.ox.ac.uk/media/global/wwwadminoxacuk/localsites/curec/documents/Decision_flowchart_for_CUREC.pdf)
- UK government's code of practice on consultation:  
[www.gov.uk/government/publications/consultation-principles-guidance](http://www.gov.uk/government/publications/consultation-principles-guidance)