Running surveys and consultations

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• 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

<table>
<thead>
<tr>
<th>Quantitative research</th>
<th>Qualitative research</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Output is numeric</em></td>
<td><em>Output is descriptive</em></td>
</tr>
<tr>
<td><strong>Used for:</strong></td>
<td><strong>Used for:</strong></td>
</tr>
<tr>
<td>- Canvassing opinions of a large number of people</td>
<td>- Gaining an indepth understanding of behaviour, attitudes, opinions and motivations</td>
</tr>
<tr>
<td>- Segmenting respondents by group or profile</td>
<td>- Examining issues identified in a quantitative survey in more detail</td>
</tr>
<tr>
<td>- Measuring opinion (eg satisfaction with a particular service)</td>
<td>- Common methodologies: group discussions; depth interviews (individual interview or in pairs)</td>
</tr>
<tr>
<td>- Common methodologies: online surveys, phone interviews</td>
<td></td>
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</tbody>
</table>
Do you want to speak to as many staff as possible or gain in-depth information?

Covering as many staff as possible: **Survey**

Does the research require evaluation of concepts or ideas?

- Yes: Use depth interviews or group discussions
- No: Consider an online survey

Depth of information: **Groups / depth interviews**

Is the information you require sensitive (e.g. discussion of aspects of working arrangements)?

- Yes: **Depth interviews** (ensures confidentiality)
- No: **Group discussions**
4. Plan an appropriate schedule
Timescale will depend on the scale of your research and the methodology you employ

Try to avoid really busy times of year (e.g., 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

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

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<tr>
<td>Preparation of research proposal and objectives</td>
<td>1 week</td>
</tr>
<tr>
<td>Recruitment of volunteers</td>
<td>3 weeks (depending on complexity of research and number of volunteers needed)</td>
</tr>
<tr>
<td>Design of focus group guide / interview questions</td>
<td>1 week</td>
</tr>
<tr>
<td>Preparation, running and analysis of pilot focus group</td>
<td>1 week</td>
</tr>
<tr>
<td>Depth interviews / focus groups</td>
<td>2 weeks</td>
</tr>
<tr>
<td>Analysis and reporting</td>
<td>1 week</td>
</tr>
<tr>
<td><strong>Total time from initial brief to final debrief</strong></td>
<td><strong>9 weeks</strong></td>
</tr>
</tbody>
</table>
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?
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**…
• **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?
• 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**
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

<table>
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<tr>
<th>Positive body Language</th>
<th>Listen</th>
<th>Demonstrate understanding</th>
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<tbody>
<tr>
<td>Make eye contact</td>
<td>Don’t interrupt</td>
<td>Repeat key points</td>
</tr>
<tr>
<td>Smile</td>
<td>Don’t finish sentences</td>
<td>Paraphrase</td>
</tr>
<tr>
<td>Nod</td>
<td></td>
<td>Identify issues</td>
</tr>
<tr>
<td>Lean forward</td>
<td></td>
<td>Capture key points on a flip chart</td>
</tr>
<tr>
<td>Face person speaking</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Face person speaking:**
- Make eye contact
- Smile
- Nod
- Lean forward
- Face person speaking

**Demonstrate understanding:**
- Repeat key points
- Paraphrase
- Identify issues
- Capture key points on a flip chart

**Listen:**
- Don’t interrupt
- Don’t finish sentences
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

- 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)