The Nuts and Bolts of Evaluation for Community Organizations:

Survey Design
October 23, 2020
To obtain **continuing education** (CE) hours:

1. Stay for the duration of the session.
2. Demonstrate engagement by participating in chat discussion and any polls.
3. Complete the evaluation that will be distributed 1-2 business days after the session.

**Housekeeping**

- Microphones are muted.
- Live Transcription is available.
- Ask questions through Q&A.
- Use the chat box to share reactions and comments.
- The recording and slide deck will be shared after today’s session.
Program Evaluation Group (PEG) partners with public and private organizations to provide evaluation training, consulting and data services.

https://ssw.umich.edu/research/program-evaluation
"We acknowledge that
The University of Michigan, named for
Michigami, the world’s largest freshwater
system and located in the Huron River
watershed, was formed and has grown
through connections with the land
stewarded by Niswi Ishkodewan
Anishinaabeg: The Three Fires People who
are the Ojibwe, Odawa, and Potawatomi
along with their neighbors the Seneca,
Delaware, Shawnee and Wyandot nations."
New webinar series!

- The Nuts and Bolts of Evaluation for Community Organizations
- Multi session series
- June – December 2020
- Practical aspects of conducting evaluation
- Free continuing education credits for social workers
- View past recordings: https://ssw.umich.edu/offices/program-evaluation/events
Agenda

1. Introductions
2. Survey Basics and Review
3. Identifying Population and Format
4. Developing Survey Questions
5. Testing Your Instrument
6. Questions and Answers
POLL: Where do you live?

Don’t live in Michigan? Tell us where in the chat box!
POLL: What sector best describes your affiliation?

1. Business
2. Community development
3. Community member
4. Criminal justice / juvenile justice
5. Education
6. Evaluation
7. Government
8. Healthcare / public health
9. Human services
10. Other (write in the chat box!)
POLL: What is your experience level with survey design?

- Novice
- Beginner
- Competent
- Proficient
- Expert
## Advantages of Surveys

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Disadvantages of Surveys

- **Inflexible**
  Can be difficult to adjust or change questions once administration begins.

- **Lack of Depth**
  Difficult to ask anything other than general questions that a broad range of people will understand.

- **Response Rates**
  Low response rates introduce nonresponse bias.

- **Ballot Stuffing**
  Participants might take a survey multiple times.
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Determining Evaluation Design

Needs Assessment

Determines if people require the service that you want to provide and if it will appropriately address their needs.

Process Measures

Determines whether a program has been implemented as intended.

Outcome Measures

Measures program efforts by assessing the outcomes that the program is trying to address.
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Some Key Questions

Who will use the information generated?

What issue or project will you be looking at?

What decision will it inform?

Example

“This survey will provide our program director with data to make modifications to our mental health services.”
Maintain Consistent Focus

Statement of Purpose and Survey Purpose should be the basis for making your questionnaire and its constructs.

Questionnaire should be an integrated whole in which each section and every question serves a clear purpose related to your evaluation goals.
Construct

An abstract idea, underlying theme, or subject matter that one wishes to measure using survey questions.

- Determine precisely how a particular construct will be measured.
- Numerical representation allows for systematic data collection on processes and phenomena that are not directly observable.
- Decreases subjectivity and increases reliability
- Use existing knowledge or develop your own scales or questionnaires.
Constructs of Interest

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Social Anxiety

**Constructs of Interest**

- Intensity of physical anxiety symptoms in social situations
- Number of recent behavioral incidents of avoidance in crowded places
- Liebowitz Social Anxiety Scale
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Defining Your Population and Sample

**Population:** All of the individuals and/or groups that are under investigation for the evaluation.

**Sample:** A representative portion of the population that is participating in the evaluation.
Who are we studying?
It’s helpful to specifically and concisely define the population under investigation.

What population specifically is in consideration for our evaluation?
Example: Clients who received service from January 1, 2020 – December 31, 2020.

What information/data do we need to complete our evaluation?
Example: Qualitative or Quantitative

How can we confirm that of our sample is representative of the population and provides data consistent with our goals?
Population Considerations

**Communication**
- What type of communication is the population comfortable with?
- Is the population equipped to understand and respond to survey questions?

**Accessibility**
- Does the population have access to the internet?
- Does the population have a landline or primarily use cell phones?
- To what degree is the population inconvenienced?

**Equity**
- Who are we not reaching?
- Is requested information sensitive?
- Are all questions necessary?

Understanding the population’s vulnerabilities limits adverse effects
What kind of sampling best fits your evaluation?
- Random
- Voluntary Response
- Convenience

**Sampling Size**

How large does the sample need to be?
- Is there a required size for data analysis?
- What volume of responses do evaluators have the capacity to handle?
- How many responses are possible given time constraints and budget?

Is the sample representative of the population?
- What information do we know about the population’s demographics?
- What members of the population are most/least likely to respond?
- Are questions asked in a way that encourages open and honest answers?
Choosing a Format

Consider your population’s age, education level, language and culture.

The timeline and budget of your evaluation may limit format options.

It is important to decide early in the evaluation how you will store your data. How can the survey format facilitate that process?
<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
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<tbody>
<tr>
<td>• Flexibility of survey length and content</td>
<td>• Postage can be expensive</td>
</tr>
<tr>
<td>• Clients can respond anonymously</td>
<td>• Evaluators must input data received</td>
</tr>
<tr>
<td>• Convenient for clients to fill out and submit on their own time</td>
<td>• Response time is variable</td>
</tr>
<tr>
<td></td>
<td>• Less control on clients’ responses (consistency and legibility)</td>
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**Equity!**

- Is your population likely to be housed?
- Are your questions understandable to someone at an 8th grade reading level?
- Do any questions reveal unnecessary personal information?
### Phone Surveys

Surveys may be conducted by calling the target populations to conduct one-on-one interviews.

### Advantages
- Inexpensive to make a large volume of calls
- Clients may give more honest answers not being face to face
- Opportunity for clarification of questions and answers

### Disadvantages
- Limited to clients owning a landline/cell phone
- Limited hours of client availability
- Requires individuals dedicated to conducting surveys

### Equity!
- Will interviewees feel comfortable answering honestly?
- What time of day are you calling the population?
- Could the privacy of the respondent be breached by caller ID?
Online Surveys

Online surveys can be administered to clients through various forms of online media and messaging.

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<td>• Ability to fix or change aspects of survey</td>
<td>• More difficult to ensure anonymity</td>
</tr>
<tr>
<td>• Fast delivery and response time</td>
<td>• Possibility of technology errors or difficulties</td>
</tr>
<tr>
<td>• Data is already online and easier to analyze or manipulate</td>
<td>• Limited population of users</td>
</tr>
</tbody>
</table>

**Equity!**

- Is your population comfortable with technology?
- Are you able to ensure anonymity with your platform?
- Does the format allow respondents to comprehensively answer each question?
Text Message Surveys

Follow the link in the chat to check our past webinars!
Comparing Survey Platforms

SurveyMonkey

Qualtrics

Google Forms

Follow the link in the chat to check our past webinars!
Pulse Check: How are you feeling?

- Confused
- Overwhelmed
- Relaxed
- Engaged
- Excited
Survey Design Overview

- Getting Started
  - Evaluation Questions
  - Determining Evaluation Design
  - Constructs of Interest

- Define Participants
  - Population
  - Sample

- Select a Format
  - Mail
  - Phone
  - Online

- Developing Questions
  - Existing Measures
  - Building Your Own

- Revise and Test
  - Order and Flow
  - Cognitive Interviews
  - Readability & Functionality

Up Next
Developing Survey Questions

Keep in mind there are many OTHER approaches to utilize!

- Utilize standardized scales
- Adapt or modify questions
- Develop new questions from scratch
Looking for Existing Measures

- Journal articles:
  - PsycINFO
  - PubMed
  - Google Scholar

- Colleagues

- Faculty

- Google
Finding a Measure with PsycINFO

Find a Test or Measure

1. Select the Multi-Field Search link.
2. Enter the name of the measure or test, e.g., Social Anxiety.
3. Select Tests & Measures from the drop-down menu.
4. When the “appended” notation is indicated, you have access to questions from tests in the journal article.
Finding a Measure with Google Scholar

Quick Tip: Include name of topic of interest (i.e., social anxiety), enter “AND,” and the word: “measure.”
Considerations for New Survey Questions

- Relevance to the client group
- Ease of administration
- Ease of interpretation
- Reliability and validity
- Sensitivity to change
- Resources needed
Survey Question Types

Close Ended

- Multiple choice
- Yes/No
- True/False
- Likert Scale (Rating Scale on Continuum)
  - A type of psychometric response scale with 5 levels/points of agreement (strongly disagree, disagree, neither agree nor disagree, agree, strongly agree).
- Rank Order (respond based on order of preference)

Open Ended

- Narrative response

Keep in Mind

- Close-ended responses require **quantitative** analysis
- Open-ended responses require **qualitative** or **content** analysis.
  - Sorting themes from each response.
  - Making inferences based on response.
Considerations for Survey Language

1. Avoid jargon, abbreviations, and acronyms
2. Avoid extreme language
3. Tied to established Statement of Purpose
4. Ensure language is accessible and culturally relevant to intended audience
What Makes Good Response Choices?

- **Mutually Exclusive**
  - Poor example: How often do you check your email in a day?
  - Overlapping answer options: A. 0-1 time | B. 1-2 times
  - C. 2-3 times | D. More than 3 times

- **Collectively Exhaustive**
  - Poor example: How would you like to receive training opportunity emails from our agency in the future? Select all that apply:
    - a) Mail b) Newspaper C) Email

- **Balanced Scales**
  - Poor example: How was the training program?
  - Unbalanced scale: Okay | Good | Fantastic | Unforgettable | Mind-blowing

- **Specific or Unambiguous**
  - Avoid “double barreled” questions
  - Poor example: How would you rate the training content and pace?
Consider Format of the Data Output

Words vs. numbers
Example: How long have you attended the program?

Check all that apply vs. Limited responses
Example: What are your concerns?

Data output depends on the survey questions you develop!
Equity Considerations for Developing Survey Questions

Do you start your survey with simple, non-threatening questions?

Are your survey questions written in a manner that is relevant to your intended audience/respondents?

Do you include answer choices that reflect all groups and identities rather than reinforcing privileged ones?
Revising and Testing Your Instrument

Order and Flow

Cognitive Interviews

Readability and Functionality
Order and Flow

Things to consider:

It can be helpful to place the most important questions in the beginning of the survey.

- Ensures that those questions are answered in case the respondent needs to stop

Sensitive and difficult questions are best positioned toward the end.

A survey should flow similar to a conversation. It is important to check the survey for a logical flow of topics.
Cognitive interviewing is a method of testing the instrument you are using.

• Examines the thought processes of participants

• Used to determine whether questions are understandable and will provide useful data
Piloting Your Survey

Pilot your survey

Ask your client(s) or colleagues to take your survey.

Set up a time to discuss their perceptions of the surveys

• Were the questions clear?
• Did you miss anything?
• Was it burdensome?
• Was language/reading level appropriate?

Refine survey based on feedback
These considerations can help ensure that respondents aren’t spending too much energy on trying to read the questions.
When testing and revising your survey, consider the following:

- What browser are respondents using?
- What device?

Viewing the survey on multiple platforms may highlight potential issues.
**Readability and Functionality: Skip Logic**

*Skip logic* routes respondents to specific questions or sections based on their response to a previous question.

In online surveys, you can usually direct the program to skip automatically. For paper surveys, you will need to add instructions.

Be sure to review these questions for flow and clarity.

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**Does a feared situation cause you to...**

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<tr>
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<th>Yes</th>
<th>No</th>
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<tbody>
<tr>
<td>Q1</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Q2</td>
<td>□</td>
<td>□</td>
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**If you answered “No” to Q2, skip to Q9. [skip]**

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[Readability and Functionality: Skip Logic](https://adaa.org/living-with-anxiety/ask-and-learn/screenings)
Readability and Functionality: Paper Surveys

Printed survey considerations

- Ensure all copies of the survey are complete.
- Questions and answers are aligned properly.
- If pages are double-sided, it should be obvious.

Consider data entry

- How will the data be entered? Will surveys be scanned?
- Avoid answer boxes with background colors or non-rectangular shapes.
- Try to keep a clear margin between boxes.
- Consider printing, completing, and scanning the survey as a test.
Equity Considerations

- If there are sensitive questions, are they completely necessary?
- Who should be involved in testing the instrument?
- Surveys should demonstrate cultural competence and contain language that is reflective of the population being studied.
- Interviewers should carefully consider the ways in which the culture of participants influences their responses.


Help us help you!

- Using Excel for Evaluation
- Data Visualization

Please write in the chat box any specific areas you want us to cover within these topics or any ideas for future webinars.
Introducing a new webinar series:

The Nuts and Bolts of Evaluation for Community Organizations
Presented by the University of Michigan School of Social Work Program Evaluation Group

Next Webinar: Using Excel for Evaluation

Date: Friday, November 20th, 2020

Time: 12:00 PM, EST

Stay in Touch!
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CE Questions
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Past Webinar Recordings
https://ssw.umich.edu/offices/program-evaluation/events