

DataCenter's Research Justice Institute
Training Series #2

We Can Be Surveyors

Facilitator's guide

Training on the basics of survey design and implementation

Prepared by the DataCenter

November 2012

We Can be Surveyors

This manual includes step-by-step facilitation instruction to conduct a series of workshops on survey design and implementation. It includes XX workshops create to move from survey project planning, survey tool design and piloting and implementing the survey. The manual is a tool for staff and leaders working on social change that want to include community in the survey process. Any sections of the curriculum can be used based on the level of community engagement you are planning for the project.

To complete all parts of training, allow for XX hours.

Table of Contents:

Recommendation: *Participants should go through the “Research Justice for All” series in order to understand framework and concepts of research justice as a basis for engaging in participatory action research. DataCenter suggest the framing tools in part 1, Titles XXXXXXXXXXXXXXX) Intro to Research Justice & Knowledge Factory Tool and summarize with a discussion about research justice and Participatory Action Research before proceeding as a way to point out the structural inequities of research and the need for PAR tools, particularly the survey tool as a way to engage and organize communities.*

Please note that though the manual provides information on key stages of the survey process to engage community members, it is not a comprehensive guide for survey projects. We strongly suggest reviewing DataCenter’s Power to the People: Creating Surveys toolkits before beginning the project..

About DataCenter

DataCenter is a national research and training center that supports grassroots organizing for justice and sustainability through strategic research, training and partnerships. Research is an essential part of creating the knowledge required to enact change. Communities have first hand experience of oppressions, and research is a tool to package those experiences so that it can be used strategically to affect change. For example, domestic workers in New York documented working conditions in their industry and used the data to pass the first-ever statewide Bill of Rights. We use research to help move the knowledge and solutions of communities of color and the poor from the margins to the center of decision-making. Recent victories that have been supported by our research include the San Francisco Wage Theft Ordinance, free bus passes for low-income youth in San Francisco, and the launching of a local and statewide campaign platform by Long Beach Khmer youth (developed from findings from a participatory action research project).

Why Research, Why Surveys?

45 minutes

This overview is intended to review basic tenants of research justice framework and ground participants in the importance of participatory research and the survey tool as one of its most powerful tools. The overview includes a case study about the National Domestic Workers Alliance (NDWA) which will be used throughout the training.

Goals & Objectives:

- Ground participants in research justice framework & importance of Participatory Action Research tools
- Show how survey tool connects the “expression” of community knowledge with the “collection” of community knowledge
- Emphasize the survey’s integral role in organizing communities and leveraging power

Agenda

1. Introduction and Icebreaker	20 min
2. Why Survey?	10 min
3. Domestic Worker Case Study	10 min
4. Summary	5 min

Materials

- ✓ Butcher Paper & Markers
- ✓ Domestic Worker Case Study

FACILITATOR INSTRUCTIONS

Introduction & Icebreaker

- 👉 Ask one participant (if possible a co-facilitator or someone outside the community) to go out of the room and ask them to draw a picture of what they know about the community from what they’ve seen or heard.
- 👉 Ask each participant to come up, introduce themselves and collectively draw a picture that represents each of the following:
 - What do you love about your neighborhood?
 - What worries you most in your neighborhood?
 - What places do you visit most in your community?
- 👉 Ask participant that went outside and drew the picture to come in and introduce him/herself and show his/her picture. Compare the two pictures. Ask participants which picture feels more detailed and why. Engage participants in which picture they would trust to get a more accurate sense of what the community is like. Why would they trust the more detailed picture?
 - Tells a more specific story (since specific questions ask)
 - More than one person so you can see trends of the community
 - Variety of answers in it so its not just one opinion
- 🗨 In our work we are trying to lift the voice of the community as a whole. In order to be effective, we need to talk to as many of our constituencies as possible and help elevate their voice and tell a story. This visual shows that we already know what’s happening in our community. But we go through the process of participatory research action to engage the many voices in our community. Get the full story. We’ve spent a lot of

time talking about the importance **of taking research into our own hands for our own ends** (reclaiming research) through a process called Participatory Action Research. Can anyone remind me what the fundamental definition of PAR is? What makes research participatory?

👉 Take a few responses until you get a solid definition:

*For research to be participatory, it means that it is not only based on the experiences of the people affected by oppression but also that **it is the people most directly affected that are intimately involved in the research process.***

Summary

🗨️ Participatory Action Research – PAR - is research that involves our community for our own end. It breaks down the wall between those doing research and those being researched. PAR lets communities acknowledges community as experts and allows for us to do our own research about our communities in order to affect change. PAR is the process of merging the collection and use of knowledge—it involves both research and action. As we collect information, we also engage our own communities.

Why Survey?

🗨️ So why do we do surveys?

👉 Brainstorm with the group until you get a solid list:

- Elevating community voices – we are the experts!
- Information not available anywhere else
- Help us understand better what is going on in our communities
- Helps us document the truths we know about our neighborhoods, workplaces and schools (show proof with data) especially if those things are social injustices abuses, etc.

🗨️ Surveys can collect valuable information that wouldn't otherwise be collected. But more importantly it involves us engaging with our community on a larger scale, which presents organizing opportunities. Why is the survey tool so common in organizing strategy?

- It's a powerful recruitment tool; helps build the membership base of our organizations
- Helps us reach out to people we wouldn't usually reach out to
- Helps educate our constituency about issues in their community
- Helps us better understand the needs of our constituency
- Increases our own and other community members leadership skills

Domestic Worker Case Study

👉 Read case study on how domestic workers used survey as a powerful tool. Discuss the following:

- Who was engaged in the process?
- What did they accomplish?
- Why was it a successful organizing tool?

Summary	
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● Throughout the next set of trainings, we are going to be focusing on surveying, which is a commonly used tool to collect expertise from the community. Surveys are only one way of doing participatory research. Oral histories, background research for designing murals, even target research on companies can be participatory when you involve your community in the process. But since surveying fundamentally involves talking to community members in large numbers and can easily involve a lot of leaders in carrying it out, it is integral to organizing and thus an important tool for us to learn how to implement in our campaigns.

Case Study: Participatory Research in Action Toward a Domestic Workers Bill of Rights



Graphic design by John Won

Since the abolition of institutionalized slavery, domestic workers have been invisible, exploited and left out of labor protections and the labor movement. Their labor has rarely been recognized by lawmakers or society at large as "real work." However, in New York City, like other command centers for the global economy, the domestic workforce is expanding, providing childcare, home and elder care while their employers go to work. Today, the New York City economy is maintained by one of the largest domestic worker labor forces in the country. Still, working conditions have improved little since the 1860s. Once a field for predominantly African American women, the domestic work industry is now predominately immigrant women of color fleeing destruction and devastation left by imperialist wars and global economic "restructuring" in the Third World. Domestic workers, especially live-in workers, work long hours, have little job security, and no control over living or working conditions or punitive immigration policies.

Domestic workers are isolated in their workplace, positioned as a social underclass/subordinate, forced to negotiate conditions one-on-one with employers—creating a situation conducive for abuse and poverty wages. There are no clear standards for domestic employment and the few protections that exist are rarely enforced.

Because the domestic work industry is fragmented, informal, and underground, it is impossible to rely on Census or labor data to analyze industry-wide trends. Working towards filling that gap, **Domestic Workers United (DWU)**, an alliance of domestic workers and domestic worker organizations working to build power among domestic workers, raise the level of respect for domestic work, and establish fair labor standards in the domestic work industry of New York City, and DataCenter collaborated on a community documentation project to gather the first ever data on practices and issues within the industry. Using a participatory, community-based research model, the project engaged domestic workers in all aspects of the research and analysis.

The report, *Home is Where the Work Is*, based on a survey of over 500 workers, was used in a six year campaign to end the exclusions of domestic workers in existing labor laws. On September 1, 2010, the governor of New York signed the first ever domestic worker bill that guarantees overtime pay, a minimum of one day off every seven days, three days of paid leave per year, and protections against sexual harassment and racial discrimination. It lays the groundwork for future protections including the unionization, paid sick days and severance pay.

For further information on DWU: www.domesticworkersunited.org.

To view the report, visit the DataCenter Publications Page: www.datacenter.org

The following set of training pieces are intended to walk participants through all the stages of a research plan. Participants will understand the importance of goal-setting and planning as a foundation for executing a successful survey.

Goals/Objectives:

- Help participants develop organizing goals as a guide for developing survey project
- Introduce participants to stages and concepts of survey planning such as your sample and mapping
- Practice using tools for planning that take different variables into account such as organizing goals, capacity, timeline, sample, etc.

Agenda

Stages of a Survey Project	20 min
Survey Planning Discussion	20 min
Planning Exercise	40 min
Summary	10 min

Materials:

- ✓ Survey Steps Cards
- ✓ Stages of survey handout
- ✓ Pre-butchered methods of finding sample
- ✓ Survey Planning Worksheet
- ✓ Survey Planning Exercise handout
- ✓ Outreach Tips handout

FACILITATOR INSTRUCTIONS

Getting the Bigger Picture: Stages of a Survey Project

- ✎ We are going to review the different steps in a survey process. Print two copies of the survey steps cards. Divide participants into two groups and give each group a set of cards. Ask them to order the cards.

-- Breakouts--

- ✎ Once both groups are done, have each group tape their cards on a wall (have the cards as two rows so everyone can see the two sets of cards together)
- ✎ Have group discuss where the order may be different. This is suggested order:
 - 1) Plan Project
 - 2) Create Survey tool
 - 3) Pilot survey
 - 4) Finalize survey
 - 5) Train surveyors

- 6) Conduct the survey
- 7) Create data base
- 8) Data entry
- 9) Data analysis
- 10) Compile information
- 11) Disseminate information

👉 Discuss the following:

- What does this exercise tell you about the survey process?
- Why is it important to generally do it in this order?
- What happens if we skip ahead to one of the stages prematurely?

Summary

🗨️ These are the stages of the planning a survey project and while the order of the smaller steps can change, generally there needs to be a plan before you design the survey, there needs to be an assessment of how you will conduct the survey before you get people to implement, and that the survey needs to be tested before you conduct the official survey and get your data.

Engaging our Community

- 🗨️ The survey is a great way to map out what is happening in our community but also a great way to engage our community. Think about the different steps of the survey process and how community can be involved. It's a great tool for leadership development. Community can be involved as:
 - Survey planning – join these kinds of workshops to develop the project
 - Survey design – work with us to develop the areas the survey covers or the actual questions
 - Conduct the survey – go out to survey our community
 - Analyze the results – look at the results together and decide what it means
 - Create findings and use results – what do we want to share with the world and how should
- 🗨️ We need to understand how to ensure that our project will be participatory and what scale our project should be on given our capacity and how we need to build our capacity if we don't have enough member involvement on the front end. Remember, the survey is a great tool organize in our community so the more people involved, the better.

👉 Brainstorm the following:

1. How will we ensure member involvement in this process?
2. Roles: Who will plan the survey? Who will be our surveyors? How will we recruit them?
3. What activities should we create to ensure that this process is accessible to our communities?

- 🗨️ This part of the planning is making sure that you have a plan for proper recruitment and training of your members as well as activities to keep them involved in the planning process.

Timeline

- 👉 Go back to the cards and think about when each step can happen. Use the below chart to create a timeline for the project.

1. Create your Timeline!	Fill in date(s)
1) Plan project (goals, audience, method, timeline)	
2) Create Survey tool	
3) Pilot Survey	
4) Finalize Survey	
5) Train surveyors	
6) Conduct the survey	
7) Create database	
8) Data entry finished	
9) Data analysis	
10) Compile information	
11) Disseminate information	

Survey Planning Discussion

- 👉 Pass out the survey planning worksheet. Through group discussion, we will plan through the goals, audience and sample of the project. Ask participants to fill out the information as you discuss each item.

Set your Goals

- 👉 Since we want this survey to be a participatory tool, we must devise a plan that most successfully engages and develops the leadership of community members. We start with the goal of our survey.
- 👉 Brainstorm the following questions with group:
 1. What is one sentence that sums up our campaign goal and the role of the survey?
 2. Who is our audience and what do we want to reveal to them? What information do we need?
 3. What concrete outcome do we want to come out of the survey? (i.e. report, town hall, media stint, present findings at city hall, etc.)
 4. What are our numerical goals for this project? How many surveys do we need to have in order to have an impact? How many people do we need to reach in order to get that number? How many surveyors do we need?

- 🗨️ These are the overall goals of your survey tool. They outline what you are working towards and dictate how you will develop, conduct, analyze, and reveal findings of your survey.

Define your Sample

- 👉 Pass out the Reaching Your Sample Handout

- 🗨️ We need to define who we want to survey. It shouldn't just be people we know, but who represents the community we are speaking about. The reality is, we cannot survey every single person so we need to create a "sample" – a subgroup of the community that represents the whole. You may want identify certain groups that you know best represents people impacted by the issue (ex: if you work on domestic worker issues, the majority of your respondents should be women) There may be previous studies or your personal experience organizing in the community that will guide you in picking your sample. Some possible variables include: age, immigration status, class, gender, ethnicity/race.

- 👉 Ask participants to brainstorm who we should be including in our sample. This can include any characteristics – race, gender, age, immigration status, occupation, where we live, etc. Record answers on butcher paper.

- 👉 Pass out the handout with Sampling <ethods for reaching our target audience and review together.

- 🗨️ There are a few methods for obtaining your sample. You can use a mix of these methods based on what you already know about accessing the community and what method would work best:

- 👉 Review the sample brainstorm and now discuss which sampling methods makes the most sense based on who on our access to the community.

Tip: This exercise should help you understand who to include in the survey and bring up discussion on how you can reach your sample. We suggest doing additional research using other data and research to further define your sample.

Wrap up Discussion

- 👉 Discuss the following for summary points:
 - What seems to be the most crucial elements for survey planning?
 - Why is it important to figure out these pieces before moving on to survey design?
 - What were the challenges to your planning?

Summary

- 🗨️ Before jumping into an elaborate survey process, it is important to figure out as much as we can. We know that things may turn up for us as we do the survey and that is why we have a piloting phase, but the more we have a grasp on the lay of the land on the front end, the easier on us it will be as we get into the process. Most importantly, we need to remember that this is a PAR tool and membership involvement is key to the success of our survey.

Survey Planning Worksheet

Set your Goals	
<p>What campaigns or organizing goals will this survey support and how?</p> <p>Which audience(s) are you trying to reach and why?</p> <p>In what form do you want to release the information gained by your survey? What's the final product you are trying to create?</p> <p>How many surveys do you need to collect to make your findings "credible"? By when will you collect them?</p> <p>When are we trying to release the information? Does it coincide with a significant event or decision?</p>	<p>Goals:</p> <p>Target Audience:</p> <p>Final Product:</p> <p>Numerical Goals (e.g. x # of surveys):</p> <p>Final Product Completed by:</p>
Determine and Reach your Sample	
<p>Who will you survey?</p> <p>What is the range of your sample: age, ethnicity, immigration status, etc. ?</p> <p>What factor(s) will you use to determine your sample? (availability, snowball, quota, and/or convenience)</p> <p>How and where will your surveys be conducted? (ex: door-to-door surveys, tabling at public areas, phonebanking, online, etc.)</p>	<p>Sample Profile:</p> <p>Reaching your Sample:</p>

Sampling Methods

Ways of Reaching your Target Audience

- **Availability**- surveying those who are available, i.e. doorknocking the neighborhood, going to an event you know your representative community will be at, advertising through certain ethnic newspaper, etc.
- **Snowball**- asking people you know or have surveyed to connect you with other people they know. With each new person, you get a few new people, creating a snowball. This is especially useful in hard to reach communities.
- **Quota**—define certain demographics as you quota that designates in advance how many people must be of a certain gender age ethnicity etc. These categories should be based on certain principles—they are representative of the group as a whole. This ensure we get a diverse range or representative data
- **Convenience**- You survey those that are most accessible to you (i.e. your members, their families, friends and other acquaintances, etc.)

The following set of training pieces is aimed at equipping participants to be experts in survey design. Participants will learn how to be intentional in designing surveys that will extract information they need to meet organizing goals. Through discussion, hands-on exercises, and instruction, participants will understand the nuts and bolts of survey design. To shorten this training, facilitators can eliminate final fishbowl exercise and end at “Refining your Survey” tips.

Goals & Objectives

- Learn how to design and tailor a survey to meet your organizational goals and needs.
- Understand how to begin the survey design process by using your own knowledge as a foundation for the survey
- Learn how to create questions that best get you the information you need by posing answers first in order to create constructive questions.

Agenda

Brainstorming Survey Themes	20 min
Survey Question Design	30 min
Survey Design Practice	90 min
Summary	10 min

Materials

- ✓ Butcher paper
- ✓ Post-its & pens or markers
- ✓ “Brainstorm Survey Topics” handout
- ✓ “What’s wrong with this question?” handout
- ✓ “How to Form Survey Questions Tips” handout
- ✓ “Types of Survey Questions Sample” handout
- ✓ “Types of Survey Questions” cards
- ✓ “Refining your Survey” handout
- ✓ “Structure of Survey” handout

FACILITATOR INSTRUCTIONS

Brainstorm Survey Themes

This session will be a “brainstorming activity.” Participants will share the knowledge they have by answering the questions:

- “What problem is this survey is trying to address?”
- “What do we know about it?”

🗨️ The process of a survey involves investigating a problem, generate new knowledge, and the objective of the survey is to tell the story or report the findings. In surveying, every story begins with questions to answer, from the general to the specific. For our communities, the “obvious” must be made “evident-” that is, the objective details of a condition and its causes must be researched and documented to make a compelling case for justice. So it’s important to start with what we know...

- ✎ Pass out the “Brainstorming Survey Topics”. Choose an issue your group is working on. For the purposes of training, facilitator instructions will use the NDWA case study example. Explain that you will start by brainstorming everything you know about the issue and everything policy makers and key institutions need to know about our issue. Distribute post its and ask participants to write on each post it one fact about the issue. Have them come up and share and place on a butcher paper. Make your own notes about overarching themes that come up.
- ✎ Ask participants what overarching themes come up with these facts. Ensure that each theme represents a key or priority problem. Write them up as headers across a butcher paper (headers for a table). Fill in anything participants might have missed. Ask participants to reorganize the facts under the themes. Move the post its under the appropriate themes. Your example chart should look like this:

An important survey design principle: As you design the types of questions you will use, imagine the potential answers you will generate and how you will analyze the data you collect.

- ✎ This will be the basis for your survey outline. Hold onto this chart for later portion of training. As we develop these questions.

Brainstorming Survey Topics

1.) Create a list of everything you want to know

Examples: Where people live, Gender, Class and ethnic background, Immigration history, Family makeup, Jobs and work, Living conditions, Working conditions

2.) Arrange them thematically

Demographics, Police/Community relations, Education and schools, Access to Healthcare, Housing problems

Example:

What do we know?	Domestic workers often work in isolation without observation or protection Employers are often individual families	Most domestic workers are women	Wages are not standardized; minimum or lower	Most domestic workers are women of color and immigrant
Major theme or area	Workplace	Gender-based work	Wages	Race and Immigrant-based

Survey Question Design

👉 Pass out “What’s wrong with this question?” Handout and have a copy of the answer key version for yourself. Ask participants to work in pairs to discuss what is wrong with each question.

👉 -- Breakouts--

👉 Come back in the group and discuss. Let participants report back what they found wrong with each question. Use the handout answer key to help guide the discussion.

👉 Pass out Forming Survey Questions Tips Handout and highlight anything was not covered.

👉 Have them go back into pairs and ask them to rewrite the questions (just questions, not answers) based on tips.

👉 -- Breakouts--

👉 Have pairs share one revised question (and ask others if it is strong or could further edited based on tips).

What's Wrong With This Question?

Identify what may be wrong with the question. If there is time, try re-writing the question a way that will work better.

1. How bad is your employer?

2. Do you think health benefits or time off is important?

3. Are there OSHA violations at your work?

4. Where is your workplace?

5. Are there a lot of abuses at your workplace?

What's Wrong With This Question?

ANSWER KEY

1. How bad is your employer?

Avoid leading questions - pushing people towards one opinion

2. Do you think health benefits or time off is important?

This question is asking two things. You don't know which one the person is responding to. Avoid asking multi-dimensional questions. Ask a single thing at a time.

3. Are there OSHA violations at your work?

OSHA is jargon and acronyms. Use terms that are accessible to a wide variety of participants.

4. Where is your workplace?

This can be answered based on a person's interpretation of location (i.e. city, state, neighborhood, country, etc.). You want to make sure everyone understands the question the same way and is answering the same. Be specific.

5. Are there a lot of abuses at your workplace?

"A lot" is interpretable. Be precise about measurement

How to Form Questions Tips

<p>Designing a closed-ended question Weak: How do you feel about the police? Strong: Which of the following best describe your feelings about the police?</p> <p style="margin-left: 40px;">a) trust b) neutral c) fear</p>	<p>Use Non-leading questions Leading: Do you think the police are doing a bad job? Non-leading: How would you rate police performance in providing safety in your neighborhood?</p> <p style="margin-left: 40px;">a) good b) average c) bad</p>
<p>One-Dimensionality Avoid questions with more than one dimension Weak: Do you feel you cannot travel freely due to your immigration status? Strong: Two separate, one-dimensional questions Do you feel you cannot travel freely? If Yes, is this due to your immigration status?</p>	

More TIPS on Forming Survey Questions

- 1.) **Keep it Neutral.** “How poorly is the president doing on job creation?” is not a neutral question. “How would you rate the president’s performance on job creation?” 1) Very Good 2) Good 3) Average 4) Bad 5) Very Bad-- gives the respondent the opening to make her or his own judgment.
- 2.) **Mix it up.** Survey-takers tend to respond to serial questions habitually. If you ask five “yes/no” questions in a row, they may repeat their most common answer- even if it doesn't apply!
- 3.) **Vary the types of questions.** A multiple choice can be followed by a yes/no; then a ranking question (rate 1 through 5) or a content-related question. 10 yes/no questions in a row can give you 10 “yes” answers even though the respondent meant to say “no” to several of the questions.
- 4.) **Avoid questions that can be answered with "I don't know."**
- 5.) **Ensure that your questions are designed consistently.** Avoid broad questions such as “How often you do you read the magazine?” Rather “In the last six months, how often did you read the magazine?” You would design all frequency-based questions with this type of clause.
- 6.) **Do not combine two questions into one.**
- 7.) **Try to avoid designing questions with multiple answers.** For example a question that begins with “circle all that apply” will be more difficult to work with when you are analyzing data.

More Tips about the Survey Framework

- ✓ First questions are “warm up” questions that are non-invasive, easily answered. This can build trust.
- ✓ Follow immediately with important questions; don’t leave these toward the end of the survey.
- ✓ 30 minutes or less is appropriate time for a survey.

Survey Question Design Exercise

- 🗨️ Based on the “brainstorm” ideas that we've charted, we need to determine the most important pieces of information about this issue. In order to avoid falling into the trap of bad questions, there are three common types of questions used in surveys. You will design questions using these types.

- 👉 Pass out the “Types of Survey Questions Sample” handout.

- 👉 Using a flip chart, list the following types of survey questions and write down key things to describe each type:
 - Multiple Choice
 - Ranking
 - Open-ended

- 🗨️ The first type of research question is **Multiple Choice**. Each question will be followed by multiple pre-determined answers. You can pick one or all that apply. There may be more than one answer. For "yes" and "no" questions, answer based upon on your actual experience. If an answer is not listed and it says “Other,” write in your own answer. Why is it useful to use multiple-choice questions?

- 👉 Take some responses until you get participants to say that these are easiest to analyze since they are quantifiable. You can throw out examples like “ 60% of 1000 people in this survey answered YES to the question ‘Is your current housing in bad condition?’ 40% responded NO” which is clear powerful data.

- 🗨️ The second type of question is called a **Ranking Question**. Answers to this type have a range that gauges higher and lower degrees of some circumstance or condition. Answers can include how often something happened (the frequency of occurrence). Some answers can gauge opinion – agreeing or disagreeing with something. A ranking question can also measure importance – by ranking things based on priority. These questions are good for opinions or feelings that are better to examine as a range. Can anyone give me an example of a question that would be ranking?

- 👉 Take a few responses and move on to next type.

- 🗨️ The third type of question is **Open-Ended**. With these questions, no answers are given to choose from. Instead, the respondents write in their own answers. What might be the benefits of adding open ended questions? And what might be challenging about them?

- 👉 Take a few responses. (Ex: makes survey more accessible and personal, find out things not on our radar, harder to analyze, etc.)

- 🗨️ Open-ended questions can be a good option because it enables respondents to freely answer with their own words and perceptions and it allows us to discover information that may not have been in our purview. Keep in mind that it takes longer to analyze open-ended questions because you have to code and categorize the responses within the framework of the themes of the survey.

👉 -- Breakouts--

- 👉 Divide into small groups (3-4 persons per group). Assign ONE research theme from the 'brainstorm.' Distribute 2 “Types of Survey Question” cards to each group and ask them to design questions to focus on the theme. For each theme, participants should start with particular information they are trying to extract. For example, if your theme is workplace, you want to start with information we brainstormed and form questions that get you to that info without falling into the traps of bad questions.
- 👉 Have each group present their questions. Ask group to share two of the questions they came up with. What difficulties did they have creating the question? Which way of writing this particular question will help us gather the information we need? Let participants help giving feedback.
- 🗨️ Even though you are trying to ask the same thing, you can now see that there are many ways to ask the same question as well as many questions to ask about the same topic. This is also a way to see which type of question will work best for arriving at the answer.

Screening, Demographic, and Timeframe Questions

- 🗨️ There are a few very important types of questions that should be included in our surveys. The first are **screening questions**, which review a series of requisites to see if the respondent qualifies for the survey. For example, you are surveying domestic workers so you have a screening question that makes sure they work in a private household and not in a hotel or day care. The second are **demographic questions** are usually besides the main questions based on the goals and vision of your survey. They ask about who the person is: age, income, gender, race/ethnicity, documentation status, ability to speak a language, years in a country, etc. Why are these two types of questions crucial?
- 👉 Take a few responses until people get basic understanding of the following:
 - We want accurate information about the topic. If we want to be catching the most accurate picture of the subject we want our survey respondents to be those we know are directly impacted and thus “experts” on the issue
 - We want to be able to show correlations between conditions and demographics to point social inequities we know to be true.

The third are **timeframe questions**. You don't want to ask question within a multitude of time frames because it might confuse the person who is being interviewed so you want to select and know your time frame. The majority of the questions should be recent enough that the person is most likely to give you accurate answers (ex: 1 week ago easier to remember than 10 years ago). Not all the questions need to be within the same time frame. While most questions can be within the chosen time frame (i.e 'last week), things that are not common but still important (such as accidents) can have a longer time frame (i.e. 3 years). You should specify the time frame of each question so that both the interviewer and the respondent will not be confused.

Types of Questions Sample

Example: A group wants to know the frequency of an certain experience by its constituents.

How often do you visit the community center? _____

The respondent may answer “a lot” or “once in a while.” If they answer 5 times, was that recent or ever? These answers don't provide specific information. Be specific about the question. The following are three different ways to ask the question using three types of questions --

OPEN ENDED: On average, how many times a month do you visit the community center?

MULTIPLE CHOICE: In the last month, how often did you visit the community?

- A) More than once a day
- B) Once a day
- C) Once a week
- D) 1-2 times a month
- E) Rarely or never

--

RATING: On a scale from 1 to 5 (one being rarely, five at least once a day), how often in the last week did you visit the community center? _____

“Types of Survey Questions” Cards

<p style="text-align: center;"><u>Multiple Choice</u> Check Only One</p> <p>Question?</p> <p>a. _____</p> <p>b. _____</p> <p>c. _____</p> <p>d. Other _____</p>	<p style="text-align: center;"><u>Multiple Choice</u> Check More Than One</p> <p style="text-align: center;">This can be check all that apply or it can be things like, pick the top three</p> <p>Question?</p> <p>a. _____ d. _____</p> <p>b. _____ e. _____</p> <p>c. _____ f. Other _____</p>
<p style="text-align: center;"><u>Open Ended / Write In</u></p> <p style="text-align: center;">You do not supply any answers, they are open to write in their own words.</p> <p>Question? _____</p> <p>_____</p>	<p style="text-align: center;"><u>Ranking</u> <u>Disagree/Agree</u></p> <p style="text-align: center;">Give degrees, have them measure their opinion. Can be numerical and/or words</p> <p style="text-align: center;">Question or a Statement</p> <p style="text-align: center;">Strongly Agree....Neutral....Strongly Disagree</p> <p style="text-align: center;">1 2 3 4 5</p>
<p style="text-align: center;"><u>Multiple Choice</u> Yes/No</p> <p>Question is laid out so that they answer Yes if they relate/experience and No if they do not.</p> <p>Question?</p> <p>a. Yes</p> <p>b. No</p>	<p style="text-align: center;"><u>Ranking</u> <u>Importance</u></p> <p style="text-align: center;">Rank things based on importance</p> <p style="text-align: center;">Question or a Statement</p> <p style="text-align: center;">Very ImportantNeutral.....Not important</p> <p style="text-align: center;">1 2 3 4 5</p>

Survey Design Practice

- 👉 Tell participants they will now go back and design their survey. Each group now gets to create a short 5-question portion of the survey based on three major themes/issue areas from the original brainstorm. Assign a volunteer who will be practicing the survey with a guest character in front of the group. Ask groups to include at least one screening question. Tell participants to write their questions on a butcher.

NDWA Example (change themes if using your own campaign)

group #1- Theme #1 : Wages

group #2- Theme #2 : Working Conditions

group #3- Theme #3: Discrimination (based on race/immigration status)

---- Breakouts---

- 👉 Bring group back together and ask the three volunteers to come up. You or a volunteer participant can be the person surveyed. Ask the larger group to observe. The process should take no longer than 10 minutes (approx. 15 questions). Note: give surveyors hard time when their questions lead to pitfalls previously discussed (leading, jargon, multi-dimensional, repetitive, etc.) Ask group:
 - What went well?
 - What was challenging?
 - For volunteers who did the role-play, what was your experience? Did you get the data you want? Why or why not?
 - What could have been done differently?
- 🗨️ Part of survey design is also structuring the survey and prioritizing questions. You don't want to overload the participant by asking repetitive questions that get you the same information. You want to pick the survey questions that get you the best information with the least words.
- 👉 Ask volunteers to post up butcher papers with their questions. Pass out "Refining your Survey" and "Structure of a Survey" handouts. Walk through process of refining surveys. Give examples from the questions they used.
- 🗨️ You are going to now to break up into two groups to create a powerful mini survey that captures the themes/issue areas that were covered keeping in mind your campaign/organizing goals. Your goal is to create a survey with *no more than 7 questions* to reveal what you need decision-makers to know about your issue. (ex: NDWA domestic workers are exploited in various ways and need protections, etc.) By now you should have plenty of questions to work with. Your goal is to sift through all these questions and decide which ones get you the best information. Discuss which questions to use, eliminate, or modify. Be prepared to carry out the survey in front of the group.
- 👉 Allow groups about 15 minutes to prioritize and order their questions. Run a fishbowl exercise. Each group will pick a volunteer who will have 5-7 minutes to carry out the survey while the other group observes. Pick a volunteer from the other group to be a respondent. Have both groups go before final discussion. After both groups have gone, discuss the following:
 - What did observers like about the other groups presentations?
 - Were there any differences in survey? What were the differences?

- What did you learn through this process?
- You may have to go through this process a few times with your own groups: create your questions, review your survey, and test it out. But your best indicator will be when you actually pilot it because you will learn what works in your community and what doesn't. Hopefully through this process you have learned all that goes into survey design.

Creating and Eliminating Survey Questions

A useful way to prioritize your questions is creating a chart. Computer programs such as excel are useful for this kind of chart.

Example Chart

Label/ Type	Original Question	Decision	Reason/Notes	Modified Version
Screening	Are you paid directly by the owner of the home?	Keep	this was added as a screening question in order to screen out those who are employed by other DW's	
Contracts	Do you usually work with a verbal agreement, written contract	Eliminate	Taken care of elsewhere	
Wages	Last week did you show up for work only to be told you were not needed?	Modify	Needs re-wording	In the last month, how many times has this employer cancelled on you with little or no notice?

Column 1: Label the category under which the question falls. The questions with the same category should be next to each other to help you see all the questions that have to do with the same topic and notice if there is anything missing or repetitive.

Column 2: Write the original question. No need to refine it. You'll get to that later.

Column 3: Review all the questions under each topic and discuss which ones to keep or eliminate based on research/organizing goals. If you can't decide on some, keep the third column blank. It may need modification.

Column 4: Put your reasons for keeping or eliminating the question so that you have a collective memory of why you made the changes.

Column 5: If you decide you don't want to eliminate the question but it needs to be modified, write the new question down.

Remember that as you create, keep, modify or eliminate questions, all these decisions should be based upon your pre-determined goals. The key research questions and list of topics you created earlier should be displayed where everyone can see while they are engaging in this process.

Structure of the Survey

Now that you have created all the questions for your survey, you have to order and structure them in a way that will be effective. The following is a list of tips about how to structure your survey.

- **Length of survey**
Try to keep the survey as short as possible – 30 minutes *at most* for individual surveys. You will need to allow more time for interview surveys, but keep in mind that a respondent may get tired and not complete the interview. If the survey takes longer than 30 minutes make sure you are offering some type of incentive.
- **Introduction**
Avoid long introductions. The introduction should be short and name the organization doing the survey. It should also include how the information gathered will be used and let people know it is anonymous and/or confidential.
- **The First Questions**
The first questions will set the tone for the survey. The person should feel they have information to contribute. By making the first few questions relatively easy to answer, you may have a higher success rate of getting surveys completely filled out.
- **The Last Questions**
Don't leave the most important questions for the end. Many surveys never get completely filled out.
- **Mix Up the Questions**
Have a range of type of questions - yes/no response, range, open ended.
- **Develop Trust Up Front**
If you must ask questions about personal questions such as immigration status, felony record, or health history place them later in the survey. Use the first part of your survey to develop the trust of the respondent and then place these questions near the end of the questionnaire.

How to Conduct a Survey

3 hours

This training helps gain skills and confidence in navigating the challenges of conducting a live survey. Through a series of role plays and discussions, participants will get hands on experience in preparing and troubleshoot

Goals and Objectives

- ✓ Participants become familiar with the survey experience, learning basic practices through simulation.
- ✓ Participants practice troubleshooting difficult situations and/or challenges they will face when administering surveys.
- ✓ Participants get comfortable with cold contact and smoothly conducting survey with strangers from start to finish including establishing contact with a rap and following up with recruitment ask.
- ✓ Participants become familiar with the survey and experience of surveying.
- ✓ Participants develop outreach strategies

Agenda

Introduction	10 min
Conducting a Survey	20 min
Difficult Situations	20 min
How to Approach Someone	30 min
Issues of Confidentiality	5 min
Summary	5 min
Review and practice the survey	60 min
Outreach strategies	30 min

Materials

- ✓ Butcher paper and markers
- ✓ Pre-butcher and/or handout for “Conducting the Survey” Tips
- ✓ Sample Rap
- ✓ “Outreach tips” handout
- ✓ “Outreach strategies” worksheet
- ✓ “Weekly Evaluation” questions

FACILITATOR INSTRUCTIONS

Review Goals for the Project

- 👉 If you have surveyors that haven’t participated in the previous workshops, we suggest including the following
 - running through the “Inside Research Justice” activity from the Research Justice for All
 - Reviewing the worksheet planning content – particularly the goals, audience, sample and timeline for the project.

Introduction

- 🗨️ Designing a good survey is half the battle. Part of our success will rely on how well we can conduct the survey. Even with some of the best surveys we can face challenges when approaching our communities with surveys. What are some of these challenges?

- Distrust—plenty of surveyors out there, what makes us different?
- Our own fears around talking to stranger about sometimes personal issues
- Not feeling prepared, what if respondents ask us questions we don't have answers to?
- Fear of rejection

🗨️ All these challenges are real. Our goal as organizers and researchers is to overcome these challenges by being as prepared as we can be and anticipating the difficult situations, having a game plan of how to deal with them, and building our confidence through practice.

Conducting a Survey: What Not to Do

- 👋 Ask a volunteer to come up and be respondent. Your job is to show in overt ways, some or all of the following mistakes— leading, being judgmental, finishing sentences, answering for the person, interpreting the question, and not reading multiple choice responses. If relevant, use questions created from survey design section.
- 👋 Ask audience what they saw and what the surveyor did wrong. Turn them into tips – butcher it and include any of the below lists if it doesn't come up. (Print out paper copy of tips too)

"Conducting the Survey" Tips:

- Ask the questions in the order they are given in the survey.
- Fully complete screening process. Make sure person is qualified before you continue.
- Read each question and answer out loud and exactly as written (when directed by the survey)
- Don't finish people's sentences. Don't assume you know how someone will answer.
- Don't "lead" people into answers
- Don't evaluate or judge respondent for his/her answers (i.e. express approval or disapproval (ex: nodding, rolling eyes, etc.)
- Don't interpret questions

🗨️ Even a single word can drastically change the meaning of a question for respondents. Do not interpret the question for the respondent. It is important that the surveyor does not influence the respondents' answers. What are some key phrases to use if the respondent asks, "What do you mean?" . . . ?

- "Whatever it means to you."
- "It's important that the question be answered as best you can in terms of the way it's stated, maybe I could read it to you again."
- "I will write down a note about that."

🗨️ Each respondent must be exposed to each question exactly as written, even if the respondent interrupts. The goal is to standardize the administration of the survey for each respondent. Don't "clarify." If they do not understand, do not interpret what you think the question means. Sometimes when we hit a road block, we can use a tactic called **probing**. Probes should be used whenever the respondent:

- gives an incomplete or unclear answer
- is hesitant to answer the questions

- seems to have trouble expressing her/himself
- seems too shy to speak at length
- seems to have not given a complete report of her/his thinking

🗨️ The most effective neutral probes are:

- Silence
- Repeating the original question
- Brief, assenting remarks (“Ok.” “I see.” “Uh huh”.)

🗨️ Probes to avoid: Don't ask "Do you mean A or B?" unless you have asked a question with only two possible responses. This is not neutral because it suggests only two possible answers, and there may be others, which do not occur to the Surveyor but would occur to the Respondent if left to her own devices. Don't ask "Do you mean (suggested answer)?" because many people tend to say "yes" to any suggestion either because it's easy or because they think it's the right answer. If you still get a blank, skip the question, make a note of it, and move on.

Difficult Situations

- 👋 Break up participants into 3 groups. Each group will have 10 minutes to come up with a 3-min skit to portray a difficult situation. Pick 3 of the following scenarios.
- Scenario 1: Respondent is distracted, isn't listening, answering yes to everything.
 - Scenario 2: Respondent gets suspicious or angry, wondering why you are asking these questions
 - Scenario 3: Respondent is uncomfortable or timid with answering the questions - skipping questions, saying “I don't know”, and being quiet.
 - Scenario 4: Respondent goes off topic and talks a lot
 - Scenario 5: Respondent gets emotional and personal

--- Breakouts---

- 👋 After 10 minutes are up have the groups share their skits with the big group. After each group shares their skit, lead a quick discussion about what to do during those situations. Solicit ideas from groups for strategies.

How to Approach Someone

🗨️ Sometimes the hardest part of surveying is approaching someone and getting his or her commitment to take the survey. What are ways to alleviate some of the fears people have around conducting surveys with strangers?

- Being prepared
- Remembering the reason we're doing the survey
- Being confident

🗨️ Talking to our community may be one of the hardest but most important skills we must get if we're going to create social change. When we're doing the survey, we must remember that (a) the purpose of the survey is to affect change that will improve our lives and (b) most people are genuinely pleased to be asked for their from members of their community. When we approach people, we want to display confidence in the work

we're doing and chances are those who believe in your cause and see your passion will participate. What are some ways to establish this confident approach?

- ✎ Brainstorm with participants strategies that portray confidence:
 - Expect to get a survey every time you speak to a respondent.
 - Be positive, upbeat, and friendly.
 - Be a good listener. Listen actively. Care about what the respondent says.
 - Be transparent about your goals at the very beginning
 - Enjoy yourself. You will feel better and it rubs off on the respondent

💬 What can you do when you get someone who says no?

- ✎ Engage participants in a discussion about navigating “no”. Make sure participants understand the importance of taking the time to push a little if there is a chance to get a commitment from a potential respondent:
 - Don't take it personally or get discouraged. There are many reasons why people say no and it's not about you so don't take it personally. There are plenty of people out there to talk to so if it's a clear no, you can move on.
 - Find out what “no” really means: is it that they don't have time? Could you come back later? Or are they shy? Sometimes people are afraid and need a little encouragement. We should feel confident to push but respectfully. For example, you can say, “I know your time is precious but this is a very important issue in the community and often our voices are not heard. The survey is short and will make a great impact...” If you still get no, move on.
 - Still tell them about your organization and goals and ask if there is a better time to come back. Sometimes people are really in the middle of something but would express that they could participate at another time. Make sure to have a follow up plan.
 - Do NOT engage in a long debate about the issue. If the potential participant wants to talk about something else acknowledge their passion about the issue, tell them about your organization, and respectfully move in if they don't wish to participate.

💬 To be prepared we must have a “rap”. This is our quick intro that tells people who we are, why we're there, and why they should care. While we shouldn't read from a script, having a good written prompt that helps us approach people with something clear and concise is important since we only have 15-30 seconds to grab people's attention. The more we get experience the less we will need a written rap as we get a good rhythm but having one to start with is essential for building our confidence and helping us feel prepared.

- ✎ Break people up into pairs and have them brainstorm a rap. Give them 5 minutes to brainstorm and 5 minutes practice on each other. The rap should include:
 - Who you are and what your organization is about (mission)
 - Why you're out here today (What the survey is about)
 - Why you're asking them to participate (i.e. why it should matter)

✎ ---- Breakouts---

- 👏 When the pairs are done practicing ask a few volunteers to come up and practice their rap in front of the group. Solicit feedback from the group.

Issues of Confidentiality and Organize!

- 🗨️ Often times at the beginning of the survey, we will need to read a consent script to each respondent. This informs the respondent that if they participate they will be asked questions about their personal background and that their responses are completely confidential and that they may withdraw from the survey at any time and have the option of skipping any question they do not wish to answer. We need to assure respondents of their anonymity.
- 👏 Check for understanding. Make sure respondents understand where this goes in the rap. Ask if anyone has questions.
- 🗨️ There's also an outro rap often referred to as "the crunch". When conducting surveys we want to make sure that we use this moment of connection as an opportunity for organizing and getting the person involved. If we're going out into the neighborhoods and talking to many people, we don't want to miss the opportunity for base-building. You want to close out by thanking people for their time, repeating why you're there and what you're doing with the survey and ending off with a very specific ask. Sometimes it's as simple as "would you like to get involved?" or "Can we follow up with you on the developments of this project?" We want it to be something that maintains our connections to them and keeps the avenue open for building a relationship. What are ways to ensure that this is separate from the survey in order to maintain their anonymity?
- 👏 Ensure the following tips:
 - Explain that the survey process is completed. And your speaking to them personally as an organizer. Talk about how you got involved in the organization.
 - Explain to the respondent that getting their contact information is for the organization and completely separate from the survey. Show them the separate contact sheet. Keep the surveys in a separate folder.
 - After you have finished conducting the survey, tell them about your organization and have a clear ask about their involvement. If they say yes, explain to them their contact information is for the organization to follow up.

Summary

- 🗨️ As we learned, conducting a successful survey is about proper planning, good design, and a game plan for dealing with difficult situations. This captures the science of surveying. But there is also an art to outreach and that is our ability to connect with people on a personal level. Our communities are often forced to be silent but one of our most natural abilities is to connect with one another about the issues that impact us. We must utilize this and not be afraid to show our passion for the issue. The more we show our conviction for the issue the more respondents we'll get.

Survey Review and Practice!

- 👏 Pass out survey and if possible, project on screen. Explain to participants this is the portion to get comfortable with reading the survey and to ensure they understand each question and

why we are asking it. This is very important if there are surveyors that haven't participated in the project before. Have each participant take turns reading out the questions. Ask if there are any questions or clarifications around the question.

- 🗨️ We will now practice on each other as if we were piloting the survey. You will partner up with the person to the right of you. Choose who will be Participant A and Participant B. You will do 2 rounds of survey practice. For round 1, A will be the surveyor and B will be the respondent. You will have 10 minutes. After 10 minutes is up, I'll stop you and you will switch. B will be the surveyor and A will be the respondent. You will start the survey where your partner left off. Make a note of any feedback you have on the questions without interrupting the survey process. This will also be valuable information. Any questions?
- 👋 Keep track of time. Ring a bell or yell switch between each round. After 20 minutes, have everyone stop and rejoin the big group. Ask the following questions and have them popcorn the answers:
 - How did it feel to survey someone?
 - How did it feel to be surveyed?
 - In terms of their surveyor role, what are things they can improve upon?

Summary

- 🗨️ It is important we get as comfortable as we can before going out to survey. Though this is practice at least it has helped familiarize us with some of the issues that may come up with the survey. Try and read through and practice surveying a few more times before we go out. You will notice, the more you survey, the easier it gets.

Outreach Strategies

- 👋 One of the greatest challenges of surveying is finding people to survey. We want to take time to brainstorm together ways to find people to survey and to support each other through the process.
- 👋 Pass out and review the "Outreach tips". Have participants break out into groups of 3 and brainstorm places to find people to survey.
- 👋 Have each group share locations.
- 👋 As a group, brainstorm how to find difficult to reach community members. Compile a list of tips you can refer to.
- 👋 Suggest weekly (or timeframe that makes sense) evaluations and meeting to support the surveying process. Come up with a list of dates and times for these meetings. Weekly evaluations are important because:
 - Revisit outreach strategies
 - We will have documentation for future expansions of membership base
 - It's a way for us to support each other while surveying

OUTREACH TIPS

OUTREACH ELEMENTS

- When: Days and times
- Where: Specific places
- Who and How many: Quotas for different type of people we want to survey

TIPS

- Strategize which type of community you might find at which locations
- Be strategic about which bus stops -- select bus stops depending on where target populations live.

TIME AND DAY

- Schedule general time slots when surveying will take place (e.g. 9a-12p ; 12p-3p).
- Strategize what are the best times and days to go to the locations.
- Evening hours don't always work for some groups because they have found that many workers just want to go home at that time.
- Be aware of season and weather when deciding your outreach strategy.

OTHER WAYS TO DO OUTREACH

If you meet a community member who is very excited and asks to help: maybe suggest a house meeting where the person can invite her/his friends and where surveyors can share about the organization and conduct surveys there.

- Create events at your organizations that will draw in community members where you can survey workers.
- Identify other community organizations, and ask if you can make a presentation or table at their events / meetings in order to meet community members who may want to participate in the survey.
- Set a particular day when several surveyors will all be at the organization or a specific location collecting surveys. Then, when you do outreach or phone banking, you can schedule people into timeslots throughout this day. You could do things that day that spark interest in your organization among the respondents, like creating a welcoming environment with food and coffee, providing literature about the organization, having a mini-orientation or show a short movie after people finish the survey, etc.
 - If (and when) setting up survey sites at other organizations/events, make sure the space is appropriate. It's important that no one can hear the answers being given by the respondent.

OUTREACH STRATEGIES WORKSHEET

Where & When

1. Buses/Trains <i>Which bus/train <u>stations</u> or <u>routes</u> are likely to be frequented by community?</i>	
<i>What time are you likely to find community there?</i>	
2. Religious Institutions <i>(List Name & Location)</i>	
<i>What time are you likely to find community there?</i>	
3. Festivals/Parades <i>Are there any festivals or parades coming up where you might be able to find community? (List names and dates)</i>	
4. Community Centers <i>(List names & dates)</i>	
<i>What time are you likely to find community there?</i>	
5. Restaurants <i>(List name, location)</i>	
<i>What time are you likely to find community there?</i>	
6. Parks <i>(List name, location)</i>	
<i>What time are you likely to find community there?</i>	
7. Grocery Stores <i>(List name, location)</i>	
<i>What time are you likely to find community there?</i>	

<p>8. Laundromats <i>Where are the laundromats in your community and what are they called?</i></p>	
<p><i>What time are you likely to find community there?</i></p>	
<p>10. Events <i>Are there any events that you know of where you can present the survey and ask for participants?</i></p>	
<p><i>What time are you likely to find community there?</i></p>	
<p>11. Other <i>What other places do you think you are likely to find community ?</i></p>	

Other Considerations

<p>1. List friends and other organizations that can help refer you to community and can help spread the word.</p>	
<p>2. Do you think there is any group that might be particularly difficult to find? Who?</p>	
<p>3. Do you know of any people or organizations that can help you connect with these hard to find community? (Please list)</p>	

WEEKLY SURVEYOR DISCUSSION

Meeting date: _____

1. How did you feel about your surveying experience this past week?

2. How many surveys did you collect ? _____

3. Where did you go?

4. What places worked well?

5. What places did not work well?

6. Tell us about one good experience you had

7. Tell us about one bad/difficult experience you had

8. What would you change for next week?

9. What help/assistance would you like or need?

10. Overall, how excited you are for next week ?

Piloting the Survey

3 hours

This portion of the training should be completed after forming your survey. Participants should evaluate a survey that they have finalized as a group and engage in fieldwork in order to reflect on effectiveness of survey and make necessary adjustments. The assumption of this workshop is that participants have a general understanding of the project, they have access to the respondents they will be surveying, and have been involved in the planning process and recruiting of other surveyors.

Goals/Objectives:

- Participants will learn how to effectively collect feedback on pilot through actual fieldwork
- Participants will develop their skills further in cold contact outreach
- Participants will learn about tools for feedback and honing surveys

Agenda

Introduction	10 min
Piloting Survey Prep	30 min
Survey Practice	60 min
Pilot Logistics	15 min
Summary	5 min

Materials:

- ✓ Butcher paper and markers
- ✓ Surveyor Handout
- ✓ Copies of the Survey
- ✓ Projector & laptop to project survey (optional)
- ✓ Pilot Feedback form

FACILITATOR INSTRUCTIONS

Introduction

🗨️ By now you have developed your expertise enough to get out there in the community and pilot your survey. This is a crucial step of the process as it is the first impression we'll be making on the community. What are the goals of a pilot?

👏 Solicit answers until you get a good enough list:

- To collect feedback about the survey from the perspectives of surveyors and survey respondents before officially beginning the survey
- To help us modify our survey so that it works better and assures that we are asking the right questions in the right way for the data we are trying to collect
- To see if the survey works for different people (ex: elders and youth, immigrants whose English is not first language, etc.)
- (if applicable) To see if the survey works in another language

👏 Review the organizing goals of your survey, the information you're trying to reveal and how important your work is. Review numerical goals for your pilot and timeline for when you want to complete that work.

Preparing for The Pilot

- 🗨️ The goal of the pilot is for each of you to go out and survey (X #) respondents and get feedback on the survey. You will start with people you know who fit the criteria of your survey. When you are out piloting your survey, you will be clear with the respondent that the intention of doing the survey is to solicit his/her feedback in order to improve the survey. You and the survey respondent will be looking for and identifying questions that are confusing, uncomfortable, and not translated well.

- 👉 Pass out the Surveyor Handout. Go over what will happen during the pilot process and what you will be doing with the respondent.

- 🗨️ While you conduct the pilot survey, please make sure you are doing the following:
 - Read through the instructions at the beginning of the survey. We also want to make sure the instructions are clear.
 - Go through the all the screening questions. Even though we know that our respondents fit our criteria, its important to test these questions out.
 - Read each question out loud and exactly as written
 - Read each of the answers when directed by the survey
 - If the respondent identifies problems with any of the questions, stop and take notes directly on the survey
 - If the respondent does not bring up any issues while the survey is being conducted, feel free to stop after each question or set of question to ask them to express any thought about the questions
 - Take notes of any information they may provide
 - Take notes about any questions that were particularly hard to go through or ask
 - Be aware of their body language and physical cues-- takes notes on this too--are they tired, confused, etc.?
 - For translated surveys, make a note of any translation errors

- 👉 Pass out feedback forms. Each surveyor will be responsible for collecting these after completing a pilot survey with their respondents. These will be collected and used in the end to refine the survey.

Feedback from the Pilot

Name of Surveyor: _____

Date of Survey: _____

Language of Survey _____

Survey start time: __:____ Survey end time: __:____

Length of time to conduct survey _____ min.

Introducing the Survey to Participant	
1. How did you find survey participant? Do you have any suggestions on how best to approach survey participant?	
2. Did you have any trouble introducing the survey to the participant? If yes, please describe?	
3. Did the introduction work to ensure confidentiality? If not, what changes would you suggest?	

Feedback on Survey Questions	
4. Overall, how would you rate the process of going through the survey with the participant on a scale to 1 to 5 (circle one): 1 Really Bad 2 Bad 3 Okay/Average 4 Good 5 Really Good	
5. Did the overall structure of the survey work? For example, the number of questions (too many/too little), the type of questions (yes/no, multiple choice, fill in the blank), the introduction, etc. If not, what changes would you suggest?	
6. Did the overall flow of the question work? For example, the order of the questions (do first few questions warm up the participant, do the later more sensitive questions that come up later come when trust is established), the clarity of the questions? Please explain.	
7. Were there questions/topics that you think were missing? Please give examples.	
8. What about the length of time the survey took? Do you think it was manageable or too hard? If too hard, how long should survey be?	

Feedback on Survey Continued

9. Were there questions that you felt were uncomfortable for the person being surveyed to answer? If yes, do you feel they should be changed or taken out? Please describe.

10. Were there questions/topics that you felt were difficult to ask? Were there questions/topics that you think are not necessary? If yes, do you feel they should be changed or taken out? Please describe.

11. Did you feel the survey worked well to open a conversation about the issues and work your organization is doing (i.e. serving as a base-building tool as well as gathering information)? Why or Why not?

For Surveys Conducted in Language Other than English

12. Did the questions make sense to the person taking the survey in the translated language? Were there questions that necessitated you making long explanations for? How can we change the translation to improve it?

13. Were there questions that didn't translate well (i.e. was literal that didn't make sense in translated language, had grammar that didn't work in translated language)?

14. Any other things that came up with translated materials?

Please give us any additional feedback or comments on Survey

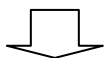
Survey Practice!

- 👉 Pass out survey and/or project on screen. Explain to participants this is the portion to get comfortable with reading the survey and that it isn't a word-smithing session. If there are issues with wording and/or translation, ask participants to make a note of it. Go through the screening questions and instructions. Have each participant take turns reading out the questions. As you go through the survey, make sure participants read the notes that come at the beginning of some of the sections. Those notes are meant to explain that we are ready to start other types of questions, or to reassure the respondent.
- 🗣️ We will now practice on each other as if we were piloting the survey. You will partner up with the person to the right of you. Choose who will be Participant A and Participant B. You will do 2 rounds of survey practice. For round 1, I will be the surveyor and B will be the respondent. You will have 10 minutes. After 10 minutes is up, I'll stop you and you will switch. B will be the surveyor and A will be the respondent. You will start the survey where your partner left off. Make a note of any feedback you have on the questions without interrupting the survey process. This will also be valuable information. Any questions?
- 👉 Keep track of time. Ring a bell or yell switch between each round. After 20 minutes, have everyone stop and rejoin the big group. Ask the following questions and have them popcorn the answers:
 - How did it feel to survey someone?
 - How did it feel to be surveyed?
 - In terms of their surveyor role, what are things they can improve upon?
- 🗣️ It is important we get as comfortable as we can before going out to pilot. Though this is practice at least it has helped familiarize us with some of the issues that may come up with the survey.

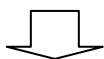
Logistics Review

- 👉 Share the timeline of your pilot project. It should look like the following:

REVIEW survey instrument, tips, and feedback forms [insert date]



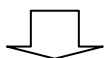
RECRUIT X # of respondents to survey the pilot by [insert date]



ATTEND Pilot Training [insert date]



PILOT THE SURVEY & FILL OUT FEEDBACK FORMS (completed by [insert date])



COLLECT SURVEYS & SURVEYOR FEEDBACK FORMS [insert date]

- 👉 Have each participant go around and talk about their recruitment goals. Where will they go to find their respondents? If they know the respondents, have them list their names. Pass out a recruitment tracking for organizer to follow up.

Summary

- 🗨️ We are now ready to go out and test our survey. Your work is not just to test the survey but also to recruit other potential surveyors. The more surveyors we have from our own communities the more scope and impact we'll have.
- 👉 Give participants an idea of how you will follow up with each of them about their surveying process. Use a guide to check in with them and troubleshoot when they are running into issues finding respondents.