

Strategies for Effective In-House Surveys:
Planning, Development & Implementation

Tressa Schultze, M.S.
 Institutional Research Associate II
 Bridgepoint Education -
 Institutional Research
 tressa.schultze@bridgepointeducation.com

Kristina M. Cragg, Ph.D.
 Associate VP of Institutional Research
 Bridgepoint Education -
 Institutional Research
 kristina.cragg@bridgepointeducation.com

Meredith Czerwinski
 Lead Survey Researcher
 Bridgepoint Education –
 Institutional Research
 mczerwinski@bridgepointeducation.com

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CAIR

You might be attending because you...

- ✓ Are responsible for implementing in-house survey plans at your institution.
- ✓ See the value of improving the impact of in-house surveys at your institution.
- ✓ Want to increase the use of meaningful survey data to inform decision-making.

We will focus on on-line surveys, although many of the concepts are applicable to paper surveys.

We will discuss...

- ✓ An overview of an effective survey process.
- ✓ Tips on how to...
 - ✓ Increase response rates for online surveys.
 - ✓ Leverage survey reporting to influence decision making.

Consultation/Needs Assessment

Identify...

- ✓ Survey Purpose
- ✓ Population
- ✓ Stakeholders/Tasks Assignment
- ✓ Timelines

Consultation/Needs Assessment

Ask...

- ✓ What do you need to know vs. want to know?
- ✓ Is this information available from another source?
- ✓ Is it necessary to relate survey responses to data?

Consultation/Needs Assessment

Determine...

- ✓ The survey population.
- ✓ How results will be used for:
 - ✓ Making decisions that impact students.
 - ✓ Deeper understanding of target populations.
 - ✓ Accreditation (regional and/or program specific).
 - ✓ State and Federal Reporting.

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Consultation/Needs Assessment

Purpose and Focus of the Survey

- ✓ For a one-time survey?
- ✓ For a recurring survey?
 - ✓ Tracking trends over time?
 - ✓ Following groups of students vs. cohorts of students



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Consultation/Needs Assessment

Define project team/stakeholders...

- ✓ Which department(s) are affected by results?
- ✓ Are all stakeholders at the table?



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Consultation/Needs Assessment

Establish roles and responsibilities...

- ✓ Agreement on length of time for tasks and who is responsible.
- ✓ Order of tasks.
- ✓ Completion of each be completed.



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Consultation/Needs Assessment

Outline and get signoff on...

- ✓ Survey purpose.
- ✓ Population.
- ✓ Timeline(s) – Deliverables and survey administration.
- ✓ Roles/responsibilities and target dates.



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Question Development

***"Successful people ask better questions, and as a result, they get better answers."* –Tony Robbins**

- ✓ Survey results are only as good as the questions asked.
- ✓ Balance of stakeholder input & scientific integrity.



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Question Development - Basics

- ✓ Avoid...
 - ✓ Double-barreled questions.
 - ✓ Leading questions.
 - ✓ Use of abbreviations and acronyms.
- ✓ Be clear and concise in wording.
- ✓ Use appropriate response scales.
- ✓ Keep it short.



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Question Development - Advanced

- ✓ Ask – “Is this question actionable?”
- ✓ Include follow-up questions – identify the how & the why.
- ✓ Be consistent in wording & rating scales.
- ✓ Strategically design question order & survey flow.



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Question Development

Ask – “Is this question actionable?”

- ❑ Basic question: “I am satisfied with the orientation program.”
- ❑ Actionable question: “To what extent did the orientation program prepare you for success in your degree of study?”

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Question Development

Include follow-up questions – identify the how & why.

- ❑ Q: “You indicated that the orientation program did not prepare you... **how can we improve?**”



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Question Development

Be consistent in...

- ✓ Use of titles, words, or phrases.
- ✓ Number of response options in scales.
- ✓ Direction of scales.
(positive → negative or vice versa)



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Question Development

Strategically design question order & survey flow.

- ✓ Move from general to specific (funnel).
- ✓ Group related questions.
- ✓ Lead with interesting questions.



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Survey Design

- ✓ Customize the survey using display logic & branching.
- ✓ Make visually appealing surveys with formatting and headlines.
- ✓ Allow time for testing & revisions.



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Survey Design

Customize the survey using display logic & branching.

- ✓ Different groups see slightly different surveys.
- ✓ Survey questions display based on previous response.
- ✓ User-friendly surveys yield better response rates.



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Survey Design

Make each survey visually appealing with formatting and headlines.



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Survey Design - No Formatting

Thank you for providing your feedback!

Please rate your level of satisfaction with the following:

	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied
Preparedness of presenters	<input type="radio"/>				
Relevance of presentation to my job	<input type="radio"/>				
Clarity of the message	<input type="radio"/>				
Effective use of visuals to convey message	<input type="radio"/>				
Applicability of handout to the presentation objectives	<input type="radio"/>				

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Survey Design - No Formatting

Thank you for providing your feedback!

Satisfaction with Presenters & Presentation
 Please rate your level of satisfaction with the following:

	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied
Preparedness of presenters	•	•	•	•	•
Relevance of presentation to my job	•	•	•	•	•
Clarity of the message	•	•	•	•	•

Satisfaction with Visual Aids
 Please rate your level of satisfaction with the following:

	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied
Effective use of visuals to convey message	•	•	•	•	•
Applicability of handout to the presentation objectives	•	•	•	•	•

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Survey Design

Allow time for testing & revisions.

- ✓ Use a mock distribution list.

Check for:

- ✓ Working survey link.
- ✓ Forced response, when applicable.
- ✓ Grammar/spelling check.
- ✓ Working survey customization.
- ✓ Clear questions & logical flow.



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Survey Deployment

- ✓ Develop a strategic communication plan.
- ✓ Create a distribution list that meets reporting needs.
- ✓ Organize on the front end to save time when analyzing the data on the back end.
- ✓ Monitor response rate to determine if an intervention is needed.



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Increasing Response Rates

- ✓ Personalize the email and signature line.
- ✓ Send a reminder, including a "last chance" reminder.
- ✓ Use an informative but short invitation.
- ✓ Include an estimate amount of time that it will take to complete the survey.
- ✓ "Promote" the survey before it is sent out as "Coming Soon."



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Increasing Response Rates

- ✓ Obtain a current distribution list.
- ✓ Send the survey to a targeted audience.
- ✓ Consider timing of survey.
- ✓ Start with easy questions first.
- ✓ Reduce frustration - test the survey.
- ✓ Close the feedback loop.



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Reporting & Analysis

- ✓ Considerable time has been utilized for an effective survey, it is important that the results are used for data driven decision making.
- ✓ Less is more - Include use of charts/graphs to make your points.
- ✓ Use PowerPoint decks rather than wordy reports.

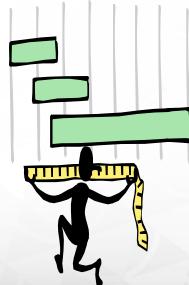


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Reporting & Analysis

- ✓ Answer the question "So What?" ... what does the information mean?
- ✓ When possible, show trend data.
- ✓ Provide information why the numbers may be different from other well-known reports.



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Question or Comments?



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