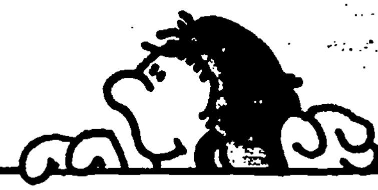
DOCUMENT RESUME

ED 393 629 RC 020 515

TITLE	Community Survey Handbook: Exploring Community Views on Community Issues and Technical "How-To" Guide.
INSTITUTION	Northern Alberta Development Council, Peace River.
PUB DATE	Feb 89
NOTE	140p.
PUB TYPE	Guides - Non-Classroom Use (055)
EDRS PRICE	MF01/PC06 Plus Postage.
DESCRIPTORS	*Community Attitudes; Community Involvement; Community Planning; Community Resources; *Community Surveys; Data Collection; Foreign Countries; *Needs Assessment; Problem Solving; Public Opinion; *Questionnaires; *Research Design; *Rural Areas; Small Towns; Test Construction; Volunteer Training
IDENTIFIERS	*Alberta (North)

ABSTRACT

This document consists of two guides that were developed to assist small rural communities in northern Alberta (Canada) in conducting surveys. A community survey can be used to develop long- and short-range plans, define and solve problems, establish priorities, confirm public opinion, develop community support and stimulate action, and reveal new information. The first guide "Exploring Community Views on Community Issues," includes four sections that provide step-by-step procedures for conducting a survey. A fictional situation in a small rural Alberta community is used to illustrate the process of conducting a community survey. Sections explain the following steps: analyzing the situation; consulting with key agencies and individuals; establishing a working committee; summarizing issues; encouraging community involvement; identifying resources; choosing a survey approach; reviewing existing information; summarizing the plan; choosing a sample; maintaining public support; designing and administering the survey; interpreting survey results; writing the report; reporting back; sharing information; creating an action plan; survey evaluation; and expressing appreciation to volunteers. The "Technical How-To Guide" provides greater detail on specific surveying techniques outlined in the first guide. Included are suggestions for setting a timeline for a community survey; selecting a sample; designing a questionnaire; conducting a pretest; training the surveyors; collecting answers through personal interviewing, telephone interviewing, mail questionnaires, and group discussions; and analyzing survey answers. Appendices in both guides include a project timeline form, list of resource agencies in Alberta, list of surveys completed in northern Alberta communities, helpful hints for volunteer surveyors, definitions, and a bibliography. (LP)



Community Survey Handbook

Exploring Community Views on Community Issues

Northern Alberta Development Council

The members of the Northern Alberta Development Council,

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are pleased to present this handbook for use by northern residents.

February 1989

Acknowledgements

The Northern Alberta Development Council is indebted to the members of the steering committee who gave their time, expertise and energy to this project:

Arlene Reid, Project Director, Northern Development Branch, Peace River
Chuck Clarke, Alberta Recreation and Parks, Peace River
Gail Gillingham, Newspaper Editor, Hythe
Grethe Jensen, Hospital Board Member, Little Smoky
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Text adapted from material prepared by Harvey Research Ltd.
Produced by Rose Country Communications Ltd.

Table of Contents

Introduction

So, you're interested in doing a community survey?

The Community Survey Handbook will show you how to find answers to your questions and identify solutions to your problems by leading you through the steps of a survey. In this handbook, doing a "community survey" does not necessarily mean using a questionnaire, although that is a very common approach. Survey here means "to examine" or "to take a look at". So, a community survey is actually looking at the views or issues of the community, using one or a combination of many possible approaches. The main approaches that we will deal with in this handbook include:

- Personal interviews
- Telephone interviews
- Mail questionnaires
- Group discussions

Many organizations are overwhelmed by the prospect of "conducting a survey". It *is* a major task and one not to be taken lightly. But, if you understand the survey process and take it step by step, you will see that it is a manageable activity. A survey can prove to be very beneficial for your group and provide you with much-needed information.

A survey can be used in a number of ways:[1]

- To develop long- and short-range plans
- To help define and solve problems
- To help set priorities
- To check if you are on track
- To find out public opinion
- To develop community support and stimulate action
- To find out new information

This handbook cannot cover everything involved in survey research. That could take volumes. But it will give you a good idea of what is involved in a survey and where you can go for other resources. There is also a *Technical "How-To" Guide* that is available and accompanies this handbook. It provides more detail on specific survey techniques, such as how to design a questionnaire and how to analyze the results.

In order to help make the survey process more understandable, we have created an imaginary situation to follow through each step. The imaginary situation involves Joy Smith, the chairman of the local recreation board, and we will follow her as she works with her board and her staff in making the recreation department more responsive to the needs of the community.

Because the handbook outlines the steps in a process, it is recommended that you read the book through to see the complete survey process. We have tried to keep the technical words to a minimum, but if you read a word you're not familiar with, you may find it in the "Terms and Definitions" section in Appendix C.

Good luck with your project and happy surveying!

Joy Smith had just moved to Northview to start a new job. Because she wanted to get involved in the community, she submitted her name for the chairman of the recreation board. To her surprise and delight, Joy was appointed to chair the six-member board. Joy discovered the recreation department had one part-time staffperson, Bob, who had been working there for several years. Bob was well-liked around town and involved volunteers in the delivery of recreation programs whenever he could.

At Joy's first board meeting, the discussion centered around the fall programs that were in the process of being planned. The Recreation Board had offered the same programming for the past five years and, during that time, the town had grown from 1400 to 2200 people. A new sawmill brought many young families to Northview for job opportunities. With the change in population and age, the board was concerned that the programs it offered might not be meeting the needs of the new community members. The decreasing number of registrants also supported this theory. How could they find out what people wanted? Should they conduct a community survey?

Before You Begin

Before You Begin

Before you decide to conduct a survey, the first question you might ask is: "Is a community survey the best possible way to find an answer to our question or a solution to our problem?"

A survey meets many needs but perhaps there is an easier or quicker method of solving your problem. Would a meeting with the mayor help? Or a letter to the local newspaper? Maybe an open line on the community radio talk show? Consider other options before determining that a community survey is your best approach.

The second question would be: "Do we really want to *know* the answers we get and are we prepared to *act* on them and carry them out?"

Joy had never been involved in a survey before. Although she knew it would take a big commitment, how else could the rec board find out if the recreation programs were meeting the need in the community? An open line talk show on the radio would let people express their opinions. But, only those listening and those interested would call. All of the people should be asked. What if the people said the recreation board was useless and didn't do anything? Well, thought Joy, if that's true, we should know it and try to improve.

Sometimes agencies or organizations already know what they would like to do, and then use a survey to support their ideas. Before you even begin planning a survey, think about what you would do if the answers you received weren't the answers you expected. How would you deal with this? Some organizations have tried to bury the survey and its results. Your group must decide in advance if it will act on the survey results, regardless of the outcome.

Community surveys can be used to help you deal with five main areas of concern. Before you begin, check to see that what you want to know can be answered by a survey.

Use a survey when you want to know...[2]

1. **What people want**
   At the community level, that might be the kinds of programs different groups would like to see offered by the recreation department.
2. **What people's attitudes are**
   Here, the focus is on what people feel, such as how seniors might feel about going to a "senior drop-in centre" if one were available.

3. **What groups need services?**
As communities and populations change, needs may change as well. This type of research can show if a specific group of people (perhaps young mothers) is not receiving services that it needs.
4. **Which alternatives would be most relevant?**
This allows a group to priorize and determine the most effective alternative. For example, when faced with scarce resources, an agency may have to determine which services to fund and which might have to be discontinued.

Joy went to the library and read about surveys. It looked as though surveys were a good way to find out the wants, needs and attitudes of the public, and also which alternatives are best and what changes will make a program more effective. Since the recreation board needed to find out what the people of Northview would like in terms of recreation programs, a community survey might provide the answers.

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5. **What should be changed to make this program more effective?**
Groups or agencies may want to evaluate their services and find out what should be changed or what is needed to improve the situation.

These five basic areas of research are not always clearly defined and sometimes overlap. A survey may draw on information from a combination of areas, like finding out what people want and their attitudes and which alternatives they prefer.

Any organization may want to undertake a community survey to gather information on its own service. However, community surveys can be flexible enough to obtain information for or about a number of organizations. In one northern community, a community survey was carried out that provided one page for each participating agency. This truly was a community survey about community agencies. Explore options. There is no one way or right way to do a survey.

Analyze the Situation

If you have decided that a community survey is the way you wish to go, the next step is to really analyze the situation. One way to do this is to ask yourselves a series of questions that will help you to sort out what you want to accomplish and the possible outcomes of your survey.

Who wants the survey done and how do they plan to use it?

Who else could be affected by the results?

Are any other factors contributing to the problem?

Do neighboring communities face the same issue?

Which community members care most about the issue now?

Who may be affected in the future if the problem is left unattended?

Has a similar study been done recently?

At the next meeting Joy brought the questions to her board and together they discussed them and compiled the answers.

1. ***Who wants the survey done and how do they plan to use it?***
   The rec board wants the survey done to identify its programming needs for the fall.

2. ***Who else could be affected by the results?***
   Ultimately, the citizens would be affected by the results. The Town Council would be, because it funds the programs and changes in programming could affect the budget. The Continuing Education Board might be interested in the results for planning and implementing its programming.

3. ***Are any other factors contributing to the problem?***
   No.

4. ***Do neighboring communities face the same issue?***
   Probably, because the new mill has brought in employees who have added to the population of the entire region.

5. ***Which community members care about the issue now?***
   People who take courses through the recreation office care because programming affects them. People who want to take courses that aren't offered also care.

6. ***Who may be affected in the future if the problem is left unattended?***
   All of the residents in Northview may be affected in the future if the programming does not reflect their needs.

7. ***Has a similar study been done recently?***
   The recreation board has never carried out its own study.

Consult with Key Agencies and Individuals

A community survey does not operate in a vacuum. It impacts on and is important to many people. Identify those people who could be interested in your concern or your results and talk to them. Visit, phone, or send out a letter and ask for comments. Let them know what you are planning and get their input and, if possible, their assistance and support. If you're not sure whether or not a specific group should be consulted, consult them. Give them the opportunity to participate. The credibility and support for the project can quickly be lost if someone opposes your project because they were not asked to be involved.

A community survey has a good chance of being successfully completed if there is overall community support for the project.

If you are a non-profit society or receive funding from another agency, you may have to obtain formal support from your sponsor—especially if your sponsor may be contributing to the costs of conducting the survey.

However, you also want broad community support from:

- High profile, credible individuals who will visibly and vocally support the concept and study
- The public, who will be answering your questions, will be affected by the results and who will expect follow-up
- Other agencies who may want to provide assistance and use the results
- Local government departments and funding agencies
- The media, who can keep the community informed by sharing information.

It was clear from the questions Joy and her board discussed that many people would be interested in and affected by the fall programs. Joy contacted Continuing Education, as well as the adult education facility, to find out if they experienced the same programming concerns. She also approached the Family and Community Support Services (FCSS) director and town office for their views. At the regional recreation meeting Joy discussed the survey idea with the directors and chairpersons of recreation boards in neighboring communities.

She certainly felt she gained much valuable information and support for her project.

Joy's board made a list of other individuals who could provide support: the mayor, the editor of the local paper, and a retired school superintendent who sat on the continuing education board. After she met with all three of them, they each said they would help as much as possible.

Establish a Working Committee

When you decide to carry out a community survey, there are many decisions to be made and tasks to be accomplished. Even though your whole organization supports the project, the group as a whole may prove too unwieldy to actually carry out the project. Also, your organization does have other activities that will continue regardless of the project. Experience has shown that an appointed smaller "working committee" or "task group" tends to be more efficient in handling the project. These individuals should be given the responsibility and authority to make decisions regarding the survey, while providing reports and feedback to the main group.

The working committee should be made up of individuals who are genuinely interested in carrying out the survey and understand and agree to the time commitment. Try to select individuals with training or insight into the steps, as well as people who initiate and carry out ideas, events and programs. Ideally, the working group should be made up of six to eight people.

The people you select may be the critical element in the success of your project. As you consider individuals to approach, ask these questions and review these points:[3]

- What knowledge and skill will they bring to the group?
- Can they work well with other members? How compatible is their work style?
- Will they have the time? Will they be able to meet deadlines?
- Consider a mix of people that reflects the characteristics of your survey population—for example, their position with the organization, education, etc.

Invite the participation of representatives from other stakeholders in the community that you have already identified:

- Other agencies who may want to gather similar information
- General public who may be affected, including the silent majority
- Media
- Others from outside the region, such as business development representatives and planning commission members
- Don't forget about the private sector. The chamber of commerce, business associates and major employers can provide another perspective and can be a valuable addition to a committee.

The chairperson of the working committee has a key role—that of manager, motivator and arbitrator. The chairperson must keep in touch with the key people and have them provide regular reports. Each committee member must be kept informed of the progress changes and problems of the other members. Committee members should be encouraged to report problems when they need help. Because your project may span many weeks and even months, expect personnel changes as a result of job transfers, illnesses and the like. The chairperson should be prepared to fill vacancies when they occur.

There is no one way to select a chairperson. This will probably be the first major decision of the working committee!

With the establishment of the working committee, you are now almost ready to act!

The rec board discussed possible committee members. Joy approached each person and most were keen to get involved. A working committee of eight members was formed:

- ***Joy** - recreation board chairperson*
- ***Mark** - rec board member, power lineman*
- ***Karen** - rec board member, local business person*
- ***Bill** - retired school superintendent, representing Continuing Education Board*
- ***Sally** - town employee, interested in study and experienced with surveying*
- ***Kris** - FCSS chairperson*
- ***Don** - FCSS board member, employed in local retail outlet*
- ***Ken** - employee relations officer at the sawmill*

Joy was thrilled! The working group members were all committed and dedicated to the project and they were all "doers". Joy contacted them and set a date for the first meeting. This would be fun!

Summarize the Issue and Purpose

Before you take action, you may have one more step. Depending on your working group and the variety of its members, you may still need to spend some time providing and reviewing background information so everyone is at the same level. Ensure each member understands and agrees to the problem, the issues, the goals and the purposes of the group and the role of the committee.

You may also want to formally review the above goals and purposes with others: the original group, other boards and organizations, and the community-at-large. This would aid your working group in gaining additional support and participation, as well as getting valuable feedback on any factors that you may have overlooked. You may even want to hold a public meeting to talk about your purpose and objectives and discuss the importance and value of initiating a community survey. The following work sheet can assist you.

Issue Summary

The following questions will help to clarify and summarize the issues. You may also want to refer to the discussion questions of the original group in "Analyze the Situation" found on page 3.

The issue is: ____________________

____

The background to the problem is:

____

____

____

What we need to learn from this survey is:

(a) ____________________

(b) ____________________

(c) ____________________

The groups who may want to use the survey results are:

(a) ____________________

(b) ____________________

(c) ____________________

The groups or individuals who will be affected by the survey results are:

(a) ____________________

(b) ____________________

(c) ____________________

The purpose of the survey is to:

____

____

Joy opened the initial meeting of the working committee. After introductions, the first decision was to select a chairperson. All agreed Joy would be the one for the job.

Next, they reviewed and summarized the issue and purpose and eventually reached an agreement. A number of concerns were raised, such as how the information would be used and the issue of confidentiality. Joy reviewed the process of the project and the tasks. She asked that anyone who did not feel able to carry out the responsibilities because of time or personal commitments to say so now before the project got started. After some discussion, all agreed they could and would commit to the project.

The first meeting gave everyone a chance to get to know each other and establish a working relationship.

Joy shared some basic survey information she had located at the library and asked everyone to review the package for their next meeting, which was set for the following week.

The Plan

SECTION 2

The Plan

The planning phase of a survey project is critical. With thorough and thoughtful planning, your working committee will have a better idea of what to expect and will receive the least amount of surprises.

There are two main questions that you will need to ask in the planning phase:

1. "What resources will we need and what community resources are available?"
2. "What are the survey options and which is the best option for us?"

As you answer these questions on resources and survey approaches, be sure to keep your community involved.

Encourage Community Involvement

Throughout the project, it is important to share information and communicate at every step. Tell people:

- What you did
- What you are doing
- What you are going to do

And once you've done that, do it again! You can never have too much community involvement and support.

Community involvement is critical to the success of your project. If the general public sees you as listening, they will be more likely to participate. Tell them how you will use their ideas and consider their comments.

Public awareness and community involvement can also help to raise the profile of your organization or agency. That can have long-term payoffs.

Involving the public has many benefits:[4]

- The public wants the opportunity to have input into decisions affecting their lives
- People in the community know what needs and goals are best for themselves
- People have many ideas, viewpoints and experiences to share

Perhaps you've had negative experiences with "the public". For example, you held a public meeting and only two people showed up. There may be valid reasons for this:[5]

- The people didn't completely understand the project, why they should get involved or how it would affect them.
- They may think no one will listen to them, anyway, so why bother.
- There may be a fear of involvement or time commitment.

- The words used—such as "community profile" or "master plan" may scare people away.
- The meeting may have been timed poorly or conflicted with another meeting.
- Some people may feel that those in charge are doing a good job and thus they are complacent.
- A public meeting may not be the right medium to deal with the issue.

The working committee will want to continually refer back to the community for its opinions and views throughout each stage to establish accountability:

- During the identification of needs and goals
- During the information collecting
- During the discussion of recommendations and the evaluation of possible directions
- At acceptance of the final plan

Make a real effort to ensure community participation. However, there will be *varying levels* of interest and involvement. Recognize that not everyone wants to participate.

One way to increase community participation is through publicity. Publicity of your project increases interest and leads to more involvement. Although this will be discussed in more detail under "Maintain Public Support" on page 34, you can publicize in the early stages of your project by sharing information on your working committee, initial plans, and so on. A variety of advertising approaches can be used:

- Newspaper articles and editorials
- Posters and flyers describing the project
- Radio announcements
- Contact with other groups in the area, such as churches, PTA and agencies.

Identify Your Resources

There are two major areas that need to be assessed in order to help you make the final planning decision: community resources and survey options. These two areas work together—the community resources available will affect the survey option that you choose and also the survey option that may be most suitable for your project affects your resources. Although your group will assess each area separately, the final approach will take both the options and the resources into consideration.

To carry out a survey of community priorities, you will need a number of resources. Identify what local resources are available to you from a variety of sources such as schools, government offices and major employers.

Human Resources

- Clerical assistance
- Survey designers/ interviewers/coders
- Survey coordinators/ supervisors/trainers
- Local expertise, advisers

Services

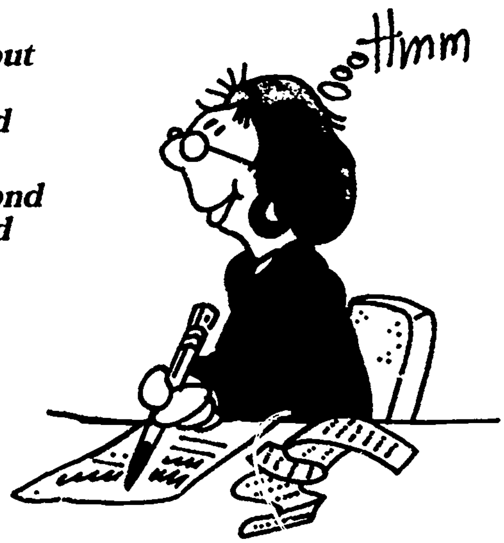
- Work area
- Photocopier
- Typewriter
- Telephone
- Paper, envelopes
- Stamps

Financial resources

- Funds available
- Potential sources of funds

Estimating the costs of a project is difficult. The cost will depend on a number of factors. Specifics can't be provided because the expenses of letterhead, stamps and photocopying always vary. Drafting a sample budget will provide you with a good indication of what expenses you can expect.

Before the next meeting, Joy reviewed the survey information. She was concerned about the budget and how the expenses could be covered. To get an idea of photocopying and postage costs, Joy drafted a rough sample budget. [6] She did not include the cost of bond paper or letterhead, as the Rec Board could supply that.



Northview Community Survey
Sample Questionnaire Budget

Paper Materials		
Questionnaire (6 pages @ .10/ea. = .60/copy)		
1000 copies - first delivery	*$ 600.00*	
Letters		
1000 copies of cover letter @ .10/each	*100.00*	
1000 copies of first follow-up @ .10/each	*100.00*	
Envelopes		
1000 - 11" × 14" brown for initial delivery @ .08/each	*80.00*	
1000 - 9" × 12" brown return envelopes enclosed in initial delivery	*60.00*	
1000 - white envelopes for first follow-up	*30.00*	
		$ 970.00
Postage		
Questionnaire - 1000 × .74	*$ 740.00*	
First follow-up - 1000 @ .38	*380.00*	
Return postage - estimate 600 @ .38 for 60% response rate	*228.00*	
		$ 1,348.00
Final Report		
Report (10 pages @ .10/ea. = 1.00/copy) — 100 copies	*$100.00*	
Distribution: 50 × .74	*37.00*	
		$ 137.00
	Total:	*$ 2,455.00*

Time

Although time is not a "resource" as such, it certainly influences your plan. Are you on a strict time line that cannot be altered or do you have a flexible, open time line?

The working committee identified their resources.

Human resources -
Bob (rec assistant) - time
Sally - expertise
Seniors - put forms together

Services -
FCSS - work area, desk, telephone (local calls)
Town office - photocopying
Sawmill - typewriter

Financial resources -
Rec board - perhaps access some funds

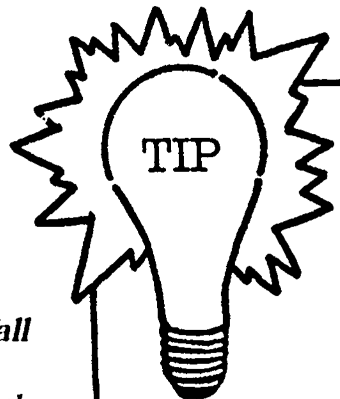
Time -
Results need to be available by May so fall programs can be planned.

Joy brought up the importance of keeping the community involved and aware. Bill volunteered to be the official public relations officer and share the information with local media.

In your timing, you will want to ensure the group you are trying to reach is available. When you schedule your survey, you may want to consider community or seasonal commitments such as:

- The Christmas season
- Easter
- Summer holidays or spring break
- Seeding time or harvest time

Setting timelines is discussed in more detail in Chapter 3.



Seniors are an excellent source of assistance, who can provide expertise, experience and manpower.

Choose Your Survey Approach

There are two basic ways of collecting information:

- Asking people questions
- Reviewing existing material

Because this handbook is talking about a 'community' survey, the interest is in finding out the views of the people—by asking them questions. Reviewing existing material is important and should be done as part of the survey process. It will be discussed at the end of this section.

There are four major methods which can be used to ask people for information. These methods can be used either alone or in a combination:

- Personal interviews
- Telephone interviews
- Mail questionnaires
- Group discussions
  - focus groups
  - public meetings

In the discussion of these methods, the advantages and disadvantages of each will be noted. As you review them, keep in mind the resources you have already identified. You should also be aware of the "response rates" of each method. The response rate is the percentage of people who answered your survey. The following calculation provides you with your rate response:

$$\frac{\text{Number who answered the survey}}{\text{Number asked to answer the survey}} \times 100 = \text{percent or "rate of response"}$$

Each survey method provides different rates of response. Some estimates are noted below:

Personal interviews
- about 80%

Telephone interviews
- about 60%

Mail questionnaires
- about 25-30% if no incentive is provided and no follow-up takes place

A mail questionnaire response rate can range from a low of 7% for a long, tedious questionnaire to up to 40% when incentives are offered and/or follow-up takes place.

Personal Interviews

In a personal interview, an interviewer meets with a person in a one-on-one discussion and asks a series of prepared questions.

Most of us have experienced a face-to-face interview, for example, census information and voter registration.

Benefits

- People tend to speak more freely in a personal interview.
- The interviewer can see when people are hesitating and encourage them or "probe".

- Complex questions can be asked as the interviewer can explain them.
- Reading problems do not prevent people from understanding the questions.
- Most people are impressed with the trouble the interviewer has taken to find and meet with them; as a result, they are usually polite and helpful.
- The interviewer can obtain information on the characteristics of people who don't respond and the reasons for their refusal.

Drawbacks

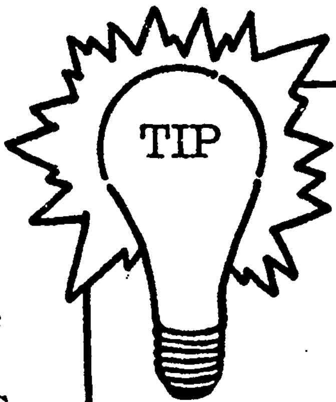
- Travel between interviews is time-consuming.
- It is the most expensive method and fewer people can be contacted.
- Finding people to carry out interviews may be a challenge. Interviewers need listening, writing and speaking skills as well as training in interview techniques. They need a personal manner that conveys understanding, patience, and respect for the privacy of others.
- The recruitment and training of interviewers is time-consuming and costly.
- The answers are difficult to analyze if responses are detailed.
- Interviews and styles may not be consistent among different interviewers, resulting in varied responses.
- People may not want to speak openly to someone they know, especially if it is a sensitive or controversial issue.
- Scheduling of interviews may be difficult and require much evening work.

With the available resources in mind, Joy and her committee reviewed the survey options.

Personal interviews—Although this would provide the most thorough results, the interviewers and coders would take time to train and time to carry out the interviews. Because the rec board needed the results for fall planning, they didn't have a lot of time. Also, the respondents might want to be anonymous if they had criticisms of the rec board and its courses.

See "How to..."
Do Personal Interviewing
in The Technical Guide

Requirements:
- Trained survey designers, interviewers, coders *or* the time to train them
- Local expertise, advisers
- Photocopier, typewriter
- Time to conduct and analyze interviews



Studies have shown that it takes 2 to 4 calls to complete one telephone interview. Plan accordingly!

Telephone Interviews

In telephone interviews, trained interviewers ask respondents a set of questions over the telephone and record their responses.

Benefits
- A high percentage of those asked to participate do respond. People are more willing to be part of a telephone interview than a mail questionnaire.
- People will give more detailed answers over the telephone than they will on a mail questionnaire.
- Reading problems do not interfere with people's ability to understand questions.
- More people can be reached in a given amount of time with telephone interviews than with personal interviews.
- Telephone interviewers are easier to select and training is shorter. Also, interviewers can be supervised.

Drawbacks
- It can be difficult to catch people near their telephones.
- Survey must be short (5 to 10 minutes) or respondent will not reply.
- Questions must be kept short and uncomplicated; it is difficult to have multiple choice questions.
- Costs of long-distance calls add up if the interviewer calls from outside the toll-free area of the people being interviewed.

Telephone interviews—As with personal interviews, the time factor for training and interviewing would be too tight for the committee.

Also, many of the people out of town have party lines or no phones. This approach would provide a higher response rate, though.

See "How to..."
Do Telephone Interviewing
in The Technical Guide

- Background noises and interruptions can cause problems.
- The survey misses people who have no phone, unlisted phone numbers or who are unwilling to answer the questions on a party line.

Requirements
- Trained survey designers, interviewers, coders *or* the time to train them
- Local expertise, advisers
- Photocopier, typewriter, telephones
- Time to conduct and analyze interviews

Mail Questionnaires

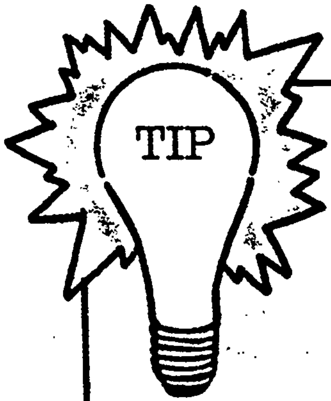
In a mail questionnaire, a series of questions are listed on a form. The respondent is asked to complete the form and send it back. Questionnaires may be delivered or mailed to the respondents and then they may be picked up, mailed back or dropped off at a convenient location.

Mail questionnaires—Since the questions the working committee wanted to ask were not complicated, mail forms would be all right. It would take less time. The answers would be anonymous. But because some people don't read, the mail-out could be combined with another approach.

Benefits
- Wider distribution is possible.
- Because the respondent stays anonymous, there may be greater honesty and personal questions are more likely to be answered.
- People can complete the questionnaire at a time that is convenient for them.
- Respondent can consult with other members of the household if expected to answer for them.
- No interviewer time is involved.

Drawbacks
- The response rate is low—many people will not complete and return a mail questionnaire.
- Interpretation of the questions is left up to the respondent.
- The questionnaire must be short and the questions must be very clear and very simple.
- The reading levels of respondents may be a problem.
- People do not always read questions carefully, answer questions completely, or answer *all* the questions on a mail questionnaire.

See "How to..."
Do Mail Questionnaire
in The Technical Guide



To increase response to a mail questionnaire:

- Follow-up with a phone call
- Offer to pick up the form
- Give a small prize to those who return the form, or enter their name in a draw.

- There is no control over who completes the form.
- Postage and envelope costs need to be included in the budget.
- It may be difficult to obtain a current mailing list.
- Time must be allowed to receive back all of the completed questionnaires.

Requirements

- Trained survey designers and coders or the time to train them
- Local expertise, advisers
- Photocopier, typewriter
- Time to mail out questionnaires, receive them back and analyze responses

Group Discussions

People can provide information in a group through a discussion process. There are two effective methods that can be used:

- Public meeting
- Focus group

Both of these approaches involve getting a number of people together, usually with varied backgrounds. In a public meeting, of course, anyone is welcome. In a focus group, however, you can limit who is invited—by number or by background.

Most people are familiar with the public meeting process. Public meetings are open to all those affected by the issue. It is an opportunity to both give and receive information, to discuss issues and, possibly, to reach an agreement. This is a more informal way of gathering information and is analyzed by recording and examining the content of the discussions.

A focus group is a method which helps a group of people analyze a problem by focusing on one specific question or problem. It brings together a varied group of people and encourages different opinions to emerge. A focus group looks at all sides of an issue. The overall issue is clearly worded as a question or problem and serves as the "focus" of the discussion.

In a focus group six to 12 people are interviewed together. A trained interviewer directs the questioning and discussion so that all group members have a chance to speak. A focus group discussion is expected to provide a wide variety of points of view on an issue. The group is not expected to reach any agreement or conclusion.

The benefits and drawbacks of both approaches are similar.

Benefits

- The opportunity is provided for one person's ideas to build on another's.
- It is possible to see what the balance of opinion is on a number of options.
- Objective decisions can be arrived at on various issues, particularly through the ranking procedure in focus groups.
- The group setting provides a chance to hear other points of view different from one's own; opinions can be changed and formed.
- The process generates information and suggests solutions.
- People may be motivated to take action on an issue as a result of a group discussion.

Drawbacks

- People who are seen to be in positions of power may influence what others say.
- A trained interviewer is needed to lead the focus group and an experienced person must chair a public meeting, so that everyone has the opportunity to speak to each point.
- Group discussions do not allow for people to give independent answers to specific questions to the extent that they can when they are asked to answer questions privately. The variety of answers that people might give in answering questions is the main thing that is learned from these discussions.
- Attendance at public meetings is usually low—except where a threat is perceived.
- Caution must be used in suggesting that the answers are representative of the entire population, as those people with a lot to lose or gain will tend to be over-represented.

Group discussions—Joy and the working committee seriously considered a group discussion approach, but finally decided against it because the rec board wanted opinions from many people—not just those who might attend a public meeting or are invited to a focus group.

See "How to..."
Do Group Discussions
in The Technical Guide

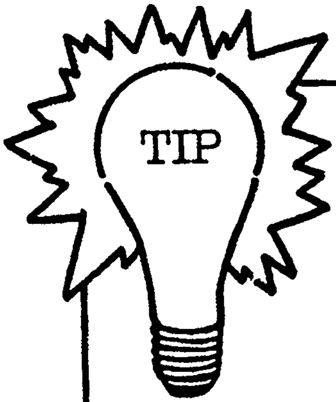
Summary of Advantages and Disadvantages of Four Survey Approaches

Approach	Advantages	Disadvantages
1. Personal Interview	• speak more freely • interviewer can probe • interviewer can explain complex questions • reading difficulties are not a problem • respondents are generally helpful • interviewers can get information on non-respondents and reasons for their lack of response	• expensive • travel between interviews is time consuming • recruitment and training of interviewers is time consuming and costly • may be awkward to ask questions on sensitive issues • answers are difficult to analyze • interviewers may not be consistent
2. Telephone Interview	• high response rate • quick, as more people can be reached in a given time period • interviewers are easier to select, training is shorter and they can be supervised	• survey must be short • questions must be short and simple • background noise and interruptions may cause problems • cannot reach those with no phones, unlisted numbers, unwilling to answer on party line
3. Mail Questionnaire	• low cost • wide distribution • less bias • allows anonymity and perhaps greater honesty • respondent can complete when convenient	• response rate is low • respondent interprets questions • questions must be clear and simple • reading levels may cause a problem • no control over who completes the form • takes time to receive all the questionnaires
4. Group Discussions	• can build on ideas • objective decisions can be reached • opportunity to hear other opinions • generates information • may motivate people to action	• people may be influenced by those in positions of power • experienced chairperson/leader necessary • attendance is usually low • those present do not usually represent the public

What Survey Method Will Suit Your Needs?

	Face-to-Face Interviews	Telephone Survey	Mailed Questionnaires	Group
1. Type of information				
If you have				
• A complicated series of questions to ask	Yes	Possibly	No	Yes
• Many open questions to ask	Yes	Possibly	No	Possibly
• Many alternatives to be considered or rated	Possibly	No	Yes	Yes
Do you need to know				
• Responses to very specific questions	Yes	Yes	Yes	Yes
• Deeper attitudes and feelings	Yes	Possibly	No	Yes
2. Collecting the Answers				
Do you need				
• Answers from specific people who are likely to respond	Yes	Yes	Yes	Yes
• Answers from a lot of people	No	Possibly	Yes	No
Do you have				
• People who have reading problems	Yes	Yes	No	Yes
• People who will not want anyone to know what they think	Possibly	No	Yes	No
• People who speak other languages	Possibly	Possibly	Possibly	Possibly
3. Time				
If you lack				
• Trained interviewers or the time to train people	No	No	Yes	Yes
• Time to code responses or people to do it for you	Possibly	Possibly	Possibly	Yes
• Time to think about the research you are doing	Never	Never	Never	Never

Note: The use of "possibly" indicates that special methods or expertise may have to be used to get accurate results.



Check your local library for books on how to run effective meetings!

Requirements
- Trained focus group leader or experienced chairperson
- Time to advertise meeting or invite participants
- Meeting room

Consultant Research

The purpose of this handbook is to outline the process of a community survey so that any community or group can have the information to carry out their own survey. However, there is always the option of hiring a consultant to help with parts of the survey or to carry out all of it.

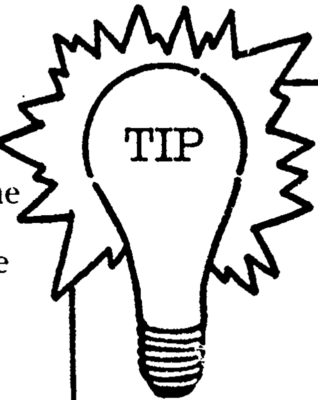
Benefits
- The time commitment of local volunteers will be much lower than in any other method.
- Some consultants have much expertise in survey design and a thorough knowledge of the survey steps.
- A consultant would have an objective and unbiased perspective of the local concern.
- The general public tends to pay more attention to a report if it is completed by an outside party.

Drawbacks
- It costs more to hire a consultant than any other survey option.
- The consultant may not thoroughly understand the community concern, which may result in a survey that doesn't address the issue.
- The community may not have a sense of owning the study if they were not involved in the survey design. They may not be committed to the results and conclusions and may not want to follow through on the study recommendations.

Consultant Research—The rec board did not have a budget to hire a consultant. Also, survey expertise was available locally to review and advise throughout the process.

Requirements

- Financial resources
- Working committee to draft the terms of reference for the study, hire the consultant, direct the survey and ensure the results and graphs are clear and understandable
- May need local volunteers, depending on survey approach



Two excellent sources on hiring consultants are listed in the Appendix: "Hiring Consultants" and "Selecting and Working with Consultants".

The working committee reviewed the types of survey methods they could do. Each had advantages over the others. After much discussion, the committee decided to combine two approaches—the mail-out questionnaire and the personal visit. Volunteers would drop off the questionnaire at the randomly selected homes and make arrangements to pick them up at a specific time. If the respondent had questions, the volunteer would provide assistance. This way, there would be a higher response rate with accurate and complete forms.

Review Existing Information

One final step before you go ahead is to see what information is already available. Other organizations may have asked the same questions that you want answered. So before you reinvent the wheel, you may want to see what information has already been gathered. [8]

Government departments at the municipal, provincial and federal levels conduct studies and gather facts regularly. There are a few broad categories of records:

- Community information
- Studies and plans
- Census statistics
- Your agency records

Some of the working committee members were aware of research reports and studies that had been conducted in Northview over the years. These could provide invaluable information for the survey, either by providing answers to their questions or by providing questions that had already been developed. Don and Ken volunteered to gather the resources, review them and report back at the next meeting. Joy offered to contact the government departments to see what information they had on Northview.

It was a full meeting. Even though everyone was exhausted, they knew much had been accomplished. To allow time for everyone to gather information, another meeting was set in two weeks.

Joy handed out a form called "Summarize the Plan" (see page 29) and said that the next time the working committee got together, the form could be completed.

Much municipal data exists and can be searched for community information. The municipal office can tell you what is available.

Local organizations such as the school board, chamber of commerce, or historical society have information on other aspects of community life. Find out what other groups in the community have conducted research.

Many studies and plans have been done by government departments and planning commissions. The information is almost always available at little or no cost. Any provincial government department can be contacted for information on the community. For example, Alberta Economic Development and Trade produces "Alberta Locations", a government publication which is revised annually and provides individual factual profiles of many Alberta communities.

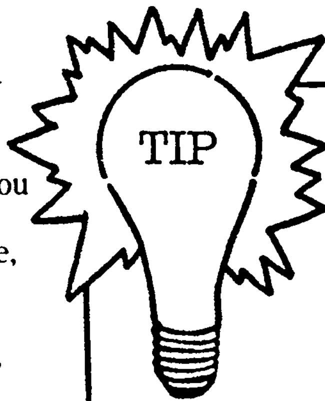
The federal government conducts a complete census every 10 years and a minor census at the five year mid-point. The last federal census was taken in 1986 so a minor census will be conducted in 1991. Information is available in the form of a "census profile" of your village, town, county, municipal district, or improvement district, which will give you information on many aspects of your community. You can find out, for instance, the total population divided by age, sex, ethnocultural origin and highest level of schooling. Occupations, average income, marital status, and types of dwellings are other facts gathered by the federal census and included in the census profile.

Your agency, as well as other community agencies, probably has material that could provide additional information. Reports, minutes, and annual reports would be useful to review for background and historical data.

Other communities have also conducted a number of studies. The Northern Alberta Development Council has copies of some of these reports and findings. See Appendix C for a listing of the community titles and the purpose of each report available at the NADC office.

Arrange a visit to your local library and see what information it can either provide or access. The library will know, for example, how to get copies of material from Statistics Canada.

Consulting the records and data already available will yield a wealth of information about your community.



The Alberta Bureau of Statistics maintains a resource library of Alberta studies. Call an information officer for reports on your community.

You may also want to consider the following points in your plan:

- Regular reports—Depending on the relationship of the working committee to the main group, you may want to provide regularly scheduled updates of activities. You may also want to keep the mayor and council informed of your progress.
- Record keeping—No matter what method of surveying is selected, accurate records are essential to success. Not only will you be able to follow your

At the next meeting, the working committee reviewed the documents available. Some were very helpful. Joy had contacted the Alberta Bureau of Statistics and had received census information on Northview. With information from the 1981 and 1986 censuses, the committee could compare the growth in Northview and the changes in family size, average age and education levels. The committee then Summarized the Plan .

Survey approach - combined mail and in person.

Resources available to the Committee:	Required:
clerical assistance – Bob	
survey design – Sally	*survey interviewers*
photocopier – town office	*survey coders*
work area, phone - FCSS	*stamps*
typewriter – sawmill	
letterhead, envelopes – rec board	

Documents available:

Census statistics
Recreation Master Plan
Tourism Action Plan

Timeline: *May*

steps, but you will also have hard evidence of what occurred.

- Budget—Your survey approach may not cost you a lot of money, especially if you plan on the effective use of volunteers. But, you would probably be surprised to know the value of your survey, considering the donations in kind and of volunteer time. Try to keep track of the hours your volunteers put in and any contributions of paper, mailing, office supplies and so on, from any organizations or groups. That will give you an overall estimate of the survey cost.
- Evaluation—Evaluation is not a post-event activity; it is a continual process that starts when the planning does. Continual evaluation notifies the committee members that their performance is important. The distance between what *is* and what *should be* indicates what additional resources are needed or what changes will have to be made. This ongoing assessment is not an imposition on people when they have selected and agreed on the objectives. [9]

As you review your plan, you may see that there are gaps between the resources you need and what is available. The working committee will have to decide whether to try to find that resource or to change the plan.

Summarize the Plan

After examining and discussing this section on planning a survey, your working committee should be able to complete the following list.

Survey approach selected: ______________________________

Resources available to the working committee:	**Resources needed:**
Human	
____________________	____________________
____________________	____________________
____________________	____________________
Services	
____________________	____________________
____________________	____________________
____________________	____________________
Financial	
____________________	____________________
____________________	____________________
Documents available	
1. ____________________	____________________
2. ____________________	____________________
3. ____________________	____________________

Timeline

Date when survey results are needed: ______________________________

Implementation

SECTION 3

Implementation

Well, you've done your groundwork. Now you're ready to implement your plan. There are four main activities that take place in the survey process:

Joy and the working committee reviewed the four main activities in implementing the survey: designing, administering, interpreting, and writing the report. After some discussion, it was clear that certain members of the committee had either expertise or an interest in specific activities. In order to make use of their skills and interests, Joy asked who would like to supervise or be responsible for certain activities. Sally wanted to design the questionnaire and Mark volunteered to look after sampling and help Sally in design. Ken was responsible for interpreting and Kris for writing the report. Joy and Bill volunteered to administer the survey with the help of Bob, the rec assistant.

The person responsible would then recruit others to help complete the tasks. Some committee members had friends and family to approach. The "volunteer list" maintained by FCSS also listed people who might be interested in getting involved. If it looked difficult to get the help that they needed, Joy said, additional strategies would have to be discussed.

- Designing the survey
- Administering the survey
- Interpreting the survey
- Writing the report

There are a number of ways to carry out these activities. Your working committee could:

- Appoint a survey coordinator to have overall responsibility
- Appoint a 'manager' for each of the four main activities
- Maintain responsibility within the working committee and delegate the tasks as they arise

In this section, we will discuss all the activities that need to take place during the implementation phase. In addition to the four main activities, choosing your sample, maintaining public support and keeping on track are also discussed.

See "How to..."
Carry out the Four Main Activities in The Technical Guide

Choose Your Sample

With all your planning, consulting and discussing, you probably have a good idea of who should answer your questic' s. These people will make up your "population".

The population refers to all the people you are interested in. For example, your population might be all of the citizens in a community or all of the seniors aged 65 and over or all of the parents with pre-school aged children.

The word "sample" refers to the people within the population who are actually interviewed or surveyed.

The accuracy of the results you get from the sample is related to the sample size.

If you are not restricted by funding or time, or if your population is small, your sample may be the entire population. Usually, however, money and time are limited. Therefore, your sample will probably be a portion of the population.

The numbers suggested below will give you an idea of how large your sample should be to find out how the entire population thinks. These numbers will be a good indication *only* if you select the people to answer questions from a list in a consistent way *and* if your questions have been well-tested *and* if everyone who is asked to answer your questions cooperates.

Total Number in the Population	**Sample Size**
100 or fewer	all
101 to 300	2 out of every 3 people
301 to 500	every second person
501 to 1,000	every third person
over 1,000	370

The percentage of people who answered the questions as compared to the people who were asked gives you the response rate. (See page – for a discussion on response rates.) The key to being able to generalize your sample results to the population is having a high response rate. For example, if your population is 1500 people, according to the chart you would need to have a sample size of 370 people. If you ask all 370 people and 185 people answer, you have a 50% response rate. Let's say you want more people to answer your questions so you decide to ask more people. This time your sample size is 600 people and 252 people respond. Your response rate is now 42%. So, even though you have more answers (252 versus 185), the percentage of people who responded is lower (42% versus 50%).

The higher your response rate, the more confident you can be that the sample results resemble your population. So, it is recommended that you keep your sample size to the numbers noted in the chart but try to get a high number of them to respond. The survey method you choose can affect response rate. Personal interviews are generally higher (80%) than telephone interviews (60%) and mail questionnaires (25 - 30%).

The Northview Community Recreational Survey is concerned with whether the recreation programs are meeting the needs of the community. The population they must ask includes:

- ***Present participants in rec courses***
- ***Past participants in rec courses***
- ***Potential participants who may take rec courses***
- ***Other agencies offering courses such as continuing education, adult education, FCSS.***

Another factor in increasing the response rate is follow-up. It is better to follow-up twice on a sample of 370 people and get a response rate of 65% than to do no follow-up on a sample of 600 people and get a lower response rate. Throw your time, energy and resources into follow-up and increasing your response rate rather than trying to increase your sample size.

You may want to consider at this point the geographic area you are concerned with. Will you want to select your sample from those in the municipal boundaries, a ten-mile radius, or some other border? The boundaries you choose could greatly affect your survey results.

Maintain Public Support

Public support is critical to the success of your project. Since it's the public who will be answering your questions and providing your answers, make sure they are aware of your plans, goals and activities. Share information about:

- why the survey is being conducted
- how the results will be used

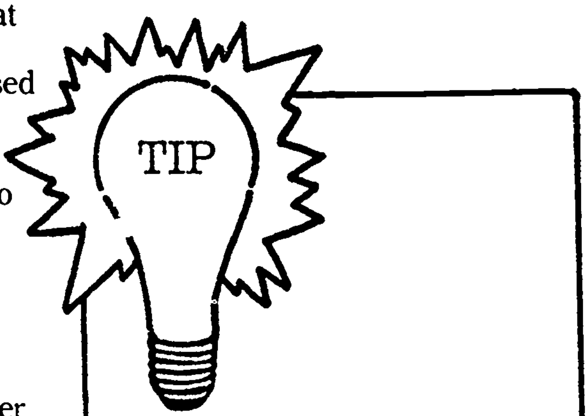
Public awareness helps by getting people mentally set to take part in the survey and by giving them background information.

It is important to have public support for your project so that the results of your survey are accepted as legitimate, unbiased and representative of public opinion.

There are a number of ways to build public awareness and support for your project:

- Provide lots of information
  - newsletters
  - formal letters
  - updates in the newspaper or on cable TV or radio
  - editorials
- Do some goodwill advertising on grocery bags
- Hold a public meeting and discuss the key issues
- Send a notice with the water bill or tax notice
- Obtain public support for the survey from high profile persons
- Present workshops which are open to survey participants and discuss the survey results

You may want to delegate the role of a public relations or information officer to someone on your working committee.



Use local media for expertise in drafting news releases and articles.

Design the Survey

- Develop survey questions and collect existing questions from those developed by others
- Edit and order the questions

See "How to..."
Design the Questionnaire
in The Technical Guide

- Compose the layout of the survey and the pre-coding
- Check to see that all general questions the survey is expected to find answers to have been addressed in one or more survey questions
- Write or arrange for cover letters and survey cover pages
- Circulate the draft survey to select individuals for their review and comment on any potential problems

See "How to..."
Pre-test
in The Technical Guide

- Supervise the pretesting and revision of the survey
- Supervise the photocopying of all survey forms and related information

Bill, being the public relations person for the Northview Community Survey, placed regular articles in the local paper. As they were getting into the implementation phase, Bill made mention of the need for volunteers in his newspaper article so the public could get involved. Three people called Bill and asked how they could help.

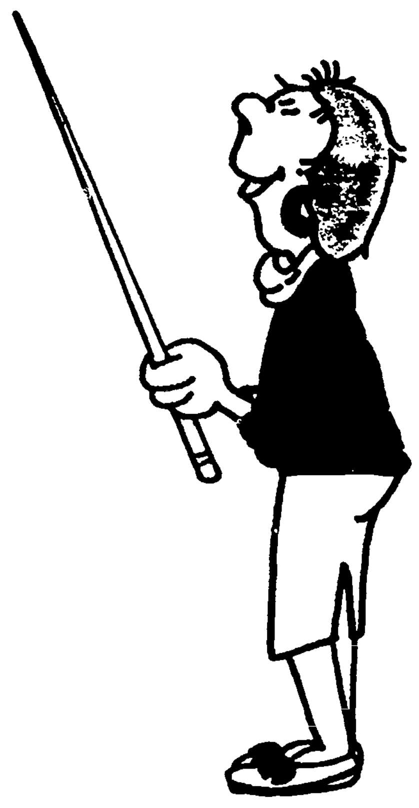
Administer the Survey

- Supervise any sampling and obtain all necessary mailing or telephone lists or local residential maps
- Recruit volunteers to assist in collecting information
- Arrange for a training session for telephone or personal interviewers

See "How to..."
Train the Interviewers
in The Technical Guide

- Supervise the interviewers, which includes discussing and keeping track of their progress
- Supervise mail-out of questionnaires (if applicable)
- Supervise the collection of all completed forms
- Follow-up to increase response rate

See "How to..."
Collect the Answers
in The Technical Guide



Keep on Track

As you can see, there are a number of tasks to be carried out in the implementation phase of your survey, particularly in the administration phase. It is easy to get lost in the process.

The key to keeping on track and progressing with your project is to outline your overall project timelines. You have already identified when you would like the survey results, but there are a lot of things to be accomplished by then. Map out the tasks and try to predict how much time you will need for each stage. This will allow everyone working on the survey to see when their contribution is needed. Talk to people who have been through a survey to try to get an idea of realistic timelines.

The following form outlines the tasks in the implementation phase. Complete it and distribute copies to your working committee. A blank form that outlines *all* of the major tasks in surveying from beginning to end is located in Appendix A.[10]

See "How to..."
Set the Timelines
in The Technical Guide

Joy asked all committee members to look carefully at the tasks they were each responsible for and to estimate the time each task would require. At the next "get-together", all of the tasks and dates were discussed and charted. It looked like a May completion date was unrealistic and June would be more likely. Since everyone except Bob was a volunteer, the activities would be done mostly in their spare time. The committee felt comfortable with the timelines and all felt they could complete the project by June. Their final chart follows:

Northview Community Recreational Survey Project Timelines

Tasks	Calendar Dates Begin	Calendar Dates End	Person Responsible
Before You Begin			
Select committee members	Dec 6	Dec 31	Joy
The Plan: Jan. 1 - 31			
Summarize the issue	Jan 1	Jan 14	all
Identify resources	Jan 1	Jan 14	all
Review and choose survey approach	Jan 14	Jan 31	all
Review existing material	Jan 14	Jan 31	Don, Ken
Maintain public support	Throughout		Bill, all
Implementation: Feb. 1 - May 30			
Design the sample	Feb 1	Feb 25	Mark (Karen)
• Get lists, names	Feb 1	Feb 7	
• Get maps or other documents	Feb 1	Feb 7	
• Draw the sample	Feb 7	Feb 22	
• Assign interviewers	Feb 22	Feb 25	
Design the Questionnaire	Feb 1	March 12	Sally (Mark)
• Collect existing questions	Feb 1	Feb 14	
• Write new questions	Feb 1	Feb 14	
• Edit and order questions	Feb 15	Feb 16	
• Layout and pre-code	Feb 16	Feb 20	
• Circulate draft for comments	Feb 20	Feb 25	
• Pre-test interview/questionnaire	Feb 25	Feb 25	
• Revise	Feb 25	March 1	
• Pre-test	March 2	March 7	
• Repeat as often as necessary			
• Final type	March 10	March 11	
• Make copies and assemble	March 11	March 12	
Administer the Questionnaire	Feb 2	April 30	Bill (Don, Bob)
• Write introductory letter	Feb 2	Feb 7	
• Recruit and select volunteers	Feb 1	Feb 15	
• Train volunteers	Feb 16	Feb 28	
• Arrange time for interviews	Feb 24	March 12	
• Assign jobs to volunteers	March 7	March 12	
• Mail/deliver questionnaire	March 12	March 15	
• Interview	March 12	April 7	
• Follow-up on mail-out	April 7	April 7	
• Collect completed questionnaires	April 30	April 30	

Tasks	Calendar Dates Begin	End	Person Responsible
Interpret the Questionnaire	April 15	May 15	Ken, Sally
Code	April 15	May 7	
Sort and cross-sort	April 15	May 7	
Tabulate	May 7	May 10	
Draft results	May 10	May 14	
Present results to committee	May 14	May 14	
Prepare report	May 15	June 7	Kris (Karen)
Plan the report	May 15	May 16	
Write the draft	May 16	May 21	
Prepare graphs and charts	May 16	May 20	
Type and edit draft	May 20	May 27	
Present draft to key groups	May 28	June 7	
Print final report	June 7	June 7	
Follow-up			
Mail/distribute the report	June 7	June 21	Bob
Share the information	June 7	June 21	Joy
Create an action plan	June 21	June 28	Bill
Evaluate	June 21	June 28	All
Show appreciation	June 30	June 30	All

Project Timelines

Tasks	Calendar Dates Begin	Calendar Dates End	Person Responsible
Implementation			
Design the sample			
• Get lists, names			
• Get maps or other documents			
• Draw the sample			
• Assign interviewers			
Design the Questionnaire			
• Collect existing questions			
• Write new questions			
• Edit and order questions			
• Layout and pre-code			
• Circulate draft for comments			
• Pre-test interview/questionnaire			
• Revise			
• Pre-test			
• Repeat as often as necessary			
• Final type			
• Make copies and assemble			
Administer the Questionnaire			
• Write introductory letter			
• Recruit and select volunteers			
• Train volunteers			
• Arrange time for interviews			
• Assign jobs to volunteers			
• Mail/deliver questionnaire			
• Interview			
• Follow-up on mail-out			
• Collect completed questionnaires			

Interpret the Survey Results

- Calculate how many people responded to the survey
- Supervise the sorting and cross-sorting of survey answers

See "How to..."
Analyze the Answers
in The Technical Guide

- Compare answers to the same questions from different groups
- Compare results from this survey to other similar surveys

See "How to..."
Interpret the Answers
in The Technical Guide

- Draft the survey results
- Present the draft to the working committee

Well, the survey is complete and the results are in! Ken and Sally presented the findings to the working committee, outlining the significant results, as well as general trends. There were some clear areas for improvement by the rec board but also some feedback that would require further discussion. Sally fielded questions and explained the findings. There were some areas that needed to be further developed. Kris took a copy of the draft to begin work on the final report.

Write the Report

Now that you've completed your survey and have the answers to your questions, you'll want to share them with everyone. A good way to do this is by writing a report of your project - what you did, why you did it and what you found out. The following outline notes the key areas you will want to address in your report.

Introduction

- Who are the members of the survey committee and when was your committee formed?
- What is the background to the problem/issue and why was the survey carried out?
- What were the purpose and objectives of the working committee?
- Who contributed resources to the survey?

Carrying Out the Survey

- What questions was the survey expected to answer?
- What type of survey was used?
- How was the survey pretested? What actions were taken due to the pretest results?
- Who was asked to answer the survey? How many were asked? How many answered? What was the response rate?
- What was the background of the people who answered the questions?
- Were you able to learn anything about the people who were asked to take part in the survey but declined the offer? If so, what did you learn?
- Were there any special problems you had in conducting the survey?

Budget

- Funding and expenses
- Donations in kind
  - services
  - volunteers

Results of the Survey

- What answers were collected for each survey question?
- Can the answers be explained by people's background? Try to explain your results.
- Were any comparisons made between the answers different groups gave for the same questions? If so, what did you learn from the comparisons?
- Were any comparisons made between your survey results and the results of other surveys? If so, what did you learn from the comparisons?

Conclusions

- Which questions were most clearly answered and what were the answers?
- Which questions had no clear answers and what were the most common answers?

Recommendations

- What course of action can be recommended considering the answers received?
- Rank the recommendations relative to the importance of the timing
  - immediate (within one year)
  - short-term (within one to two years)
  - long-term (ongoing or more than three years)

After you've received input from all the members of your working committee, share the draft with other organizations. People like to feel that they have had the opportunity for input to conclusions and recommendations. Their comments and suggestions may be helpful in preparing the final document. It is better to have their input at the draft stage than to have them possibly not accept the recommendations in the final report. Perhaps hold a community meeting with the key agencies and interested people to review the draft and priorize the recommendations.

When Kris completed the draft report, the committee got together to review it. Sally had already shared with Kris and Joy the areas that were re-developed and she now shared them with the committee. In general, there was much satisfaction with the survey results and with the draft report. Some minor editing was required with the draft, including some figure changes in the budget. Joy arranged for a presentation of the final draft to the recreation board for its review and comments, as well as suggestions for recommendation. A public meeting was also scheduled, with invitations extended to the mayor and local agencies and organizations. The recommendations would be developed then.

Follow-up

Follow-up

Now it is time to decide what action you should take as a result of the information you just collected. If nothing happens, the information you gathered was a waste of time and effort. Also, the people in the community could be upset because you asked them what they thought and then ignored their answers.

The local people are involved and interested in the project. Make sure the results are visible.

Report Back

Depending on the relationship your working committee has with the main group, you may want to formally submit your report for its acceptance and adoption by the sponsoring organization.

Share the Information

If you've done your groundwork, the public will be anxiously awaiting the results of your efforts. Tell them!!

- Hold a press conference
- Issue news releases
- Hold workshops and invite the survey participants, interested organizations and the general public
- Prepare a presentation and address town council and local groups
- Send the report to government departments, organizations and agencies
- If the report is long, write a two or three page executive summary that can have a wider distribution
- Have the report and/or summary available at the town office for interested people

Now that the report was final, complete with recommendations and conclusions, Joy wanted to be sure everyone knew about it. Copies were distributed to all local agencies, organizations and government offices. She talked to the newspaper about having a weekly series in which the results of the report could be shared. The articles would also indicate that executive summaries of the report were available at the rec office and FCSS office.

Create an Action Plan

If you've drawn conclusions or made recommendations, how are you going to ensure they are carried out? One thing you don't want is another report filed on a shelf.

- Bring together the key players and discuss the recommendations
- Identify any time or financial constraints which could apply

Joy knew that to implement some of the recommendations, a plan of action should be drawn up. A public workshop date was set, with the objective to determine actions to implement the recommendations. One recommendation was that there should be more aerobics classes available at different times of the day - noon, after work, evening. An action plan could look like this:

Action	Resources	Responsibility	Measure	Deadline
Ten volunteers from the community to be recruited and trained to teach aerobics classes	*$200 for instructor and advertising*	*Recreation staff to retain instructor and set up training course*	*Successful certification of eight instructors Report to Board*	*Dec. 19*

Everyone in the workshop could brainstorm on the action plans. The community would have a lot of ideas.

- For each recommendation, identify an action plan:[11]
  - What will happen?
  - By when?
  - What resources—money, material, or manpower—are required?
  - Who specifically will carry out the action plan?
- Maintain flexibility of action plan
- Review progress regularly and update
- Plan for a long-term evaluation of the action plan and the process

Evaluate Yourselves

You've done a fine job! But, now that you look back over the whole project, would you do everything the same? Since hindsight is 20-20 vision, you can probably see areas that you would do differently and methods that were not quite as effective as they could have been.

Your last task as a working committee is to review, with a critical eye, the process you've just been through. Without laying blame, try to note what you would change or what could have been improved.

You may want to put copies of all your letters, memos, notices, newspaper clippings and evaluations into a book for future reference. Remember when you got started on your survey and you wished you had somewhere to turn or something to refer to? Don't make the next group reinvent the wheel. Share your information - what worked? what didn't? Store your records in a public place - the library, town office, FCSS office or all of them. Someone will thank you for it in the future.

Show Your Appreciation

Your volunteers have worked long and hard. It's been a tough go, no doubt with many ups and downs. But you've completed a major project that will benefit everyone in your community. How can you show your appreciation to your hardworking committee and volunteers?

- Have a banquet or a wine and cheese social to honor your volunteers
- Present volunteers with a plaque, certificate or a small gift

Joy knew the volunteers and committee had worked long and hard - far beyond the call of duty. She contacted each of them and asked if they could make a final meeting on Saturday afternoon. Although most weren't pleased with a weekend meeting, they all agreed to attend.

Joy arranged a special appreciation tea hosted by the Royal Purple ladies. As the volunteers arrived, they were greeted by a roomful of local leaders and officials, a decorated hall and plenty of goodies. Joy thanked them and presented each with a small gift, donated by the local jewellers.

The committee had learned a lot during the survey and knew that it had been a worthwhile project. They patted each other on the back—it had been a job well done.

- Write a nice letter, recognizing their efforts and specific contributions, that could be attached to a resume
- Arrange public recognition such as getting their pictures printed in the newspaper

Pat yourselves on the back. It was a job well done!

Last Words

Using a community survey can make a tremendous difference to any community. You can plan with confidence, knowing you are well informed about the issues, the concerns and the community. In times when the effective use of material, money and human resources is essential, one of the best ways to ensure you are meeting the needs of the community is to do a *Community Survey.*

Appendices

Appendix A

Project Timelines

Tasks	Calendar Dates Begin	End	Person Responsible
Before You Begin			
Select committee members			
The Plan			
Summarize the issue			
Identify resources			
Review and choose survey approach			
Review existing material			
Maintain public support			
Implementation			
Design the sample			
• Get lists, names			
• Get maps or other documents			
• Draw the sample			
• Assign interviewers			
Design the Questionnaire			
• Collect existing questions			
• Write new questions			
• Edit and order questions			
• Layout and pre-code			
• Circulate draft for comments			
• Pre-test interview/questionnaire			
• Revise			
• Pre-test			
• Repeat as often as necessary			
• Final type			
• Make copies and assemble			
Administer the Questionnaire			
• Write introductory letter			
• Recruit and select volunteers			
• Train volunteers			
• Arrange time for interviews			
• Assign jobs to volunteers			
• Mail/deliver questionnaire			
• Interview			
• Follow-up on mail-out			
• Collect completed questionnaires			

Tasks	Calendar Dates Begin	End	Person Responsible
Interpret the Questionnaire			
• Code			
• Sort and cross-sort			
• Tabulate			
• Draft results			
• Present results to committee			
Prepare report			
• Plan the report			
• Write the draft			
• Prepare graphs and charts			
• Type and edit draft			
• Present draft to key groups			
• Print final report			
Follow-up			
Mail/distribute the report			
Share the information			
Create an action plan			
Evaluate			
Show appreciation			

Appendix B

Resource Agencies

Alberta Bureau of Statistics
7th Floor, 9811 - 109th St.
Edmonton, Alberta
T5K 0C8
427-3058

Alberta Career Development and Employment
Regional Offices

Room 206, 10363 - 108th St.
Edmonton, Alberta
T5J 1L8
422-0046

Bag 900-41
9621 - 96th Ave.
Peace River, Alberta
T8S 1T4
624-6531

Alberta Culture and Multiculturalism
Regional Cultural Consultants

#2501 Provincial Building
10320 - 99th St.
Grande Prairie, Alberta
T8V 6J4
538-5408

#316 Provincial Building
5025 - 49th Ave.
St. Paul, Alberta
T0A 3A0
645-6328

Alberta Economic Development and Trade
Regional Business Development Branch
Regional Offices

Box 2490
111 - 54th St.
Edson, Alberta
T0E 3A0
738-8229

Bag 900-3
10122 - 100th St.
Peace River, Alberta
T8S 1T4
624-6113

#1401 Provincial Building
10320 - 99th St.
Grande Prairie, Alberta
T8V 6J4
538-5230

Box 1688
5025 - 49th Ave.
St. Paul, Alberta
T0A 3A0
645-6358

Alberta Municipal Affairs
Regional Office

Bag 900-30
9621 - 96th Ave.
Peace River, Alberta
T8S 1T4
624-6189

Planning Services Division
9925 - 107th St.
Edmonton, Alberta
T5K 2H9
427-2225

Northern Alberta Development Council

Bag 900-14
#206, 9621 - 96th Ave.
Peace River, Alberta
T8S 1T4
624-6274

Alberta Recreation and Parks

Regional Offices

Box 747
4926 - 1st Ave.
Edson, Alberta
T0E 0P0
723-8227

Box 1454
5025 - 49th Ave.
St. Paul, Alberta
T0A 3A0
645-6353

Box 1078
4917 - 53rd Ave.
High Prairie, Alberta
T0G 1E0

#1701 Provincial Building
10320 - 99th St.
Grande Prairie, Alberta
T8V 6J4
538-5300

Bag 900-11
3rd Floor, 9621 - 96th Ave.
Peace River, Alberta
T8S 1T4
624-6295

Regional Planning Commissions

MacKenzie Regional Planning Commission
Box 450
Berwyn, Alberta
T0E 0E0
338-3862

South Peace Regional Planning Commission
200 Windsor Court
9835 - 101st Ave.
Grande Prairie, Alberta
T8V 0X6
532-0988

Yellowhead Regional Planning Commission
Box 245
Onoway, Alberta
T0E 1V0
967-2249

Statistics Canada

#215, 11010 - 101st St.
Edmonton, Alberta
T5H 4C5
1-800-282-3907

Appendix C

Northern Community Surveys

The following surveys have been completed in northern communities. For more information or a copy of the report, please call the Northern Development Branch or contact the community directly.

Town of Grande Cache Community Needs Assessment Survey; FCSS Board, February 1987.

Purpose—To provide directions for new or existing programs and identify needs that can be addressed in the future.

Hythe and District 1988 Community Survey; FCSS Advisory Board and Harvey Research Ltd., March 1988.

Purpose—To establish new direction for the delivery of service by the Hythe and District FCSS Advisory Board.

Elk Point and District Senior Citizens' Survey; Elk Point Steering Committee, 1987-1988.

Purpose—To identify seniors' needs, identify programs for seniors and assess their adequacy and to make recommendations to help local agencies and services make plans that will let them serve seniors better.

The Valleyview and District Human Needs Survey; McQ Enterprises Ltd., December 1985.

Purpose—To identify and describe the extent of existing and potential social and health care problems affecting particular target groups in the Valleyview area and suggest strategies through which these problems may be addressed by the Human Needs Committee.

Tourism—Lac La Biche Country; Lac La Biche Blueprint for the Future Committee, September 1985.

Purpose—To study the direction and impact of tourism in the Lac La Biche area.

Some Community Impacts of the New Correctional Centre at Grande Cache; The DPA Group Inc., June 1985.

Purpose—To assess the number of inmate families that might be expected to move into the community and their needs so that positive support measures could be put in place.

Beaverlodge Community Survey; Fresh Start Consultants Ltd., June 1985.

Purpose—To identify community needs in order to give direction to town council, to give the community a chance to identify its needs and to provide part of the basis for acquiring funds for development.

Elk Point and District Community Impact Study; Nichols Applied Management, January 1985.

Purpose—To examine community concerns regarding growth and development, to evaluate the potential socio-economic impacts of resource development activities on the community and surrounding area and to formulate recommendations which will minimize negative community impacts on the community and enhance the positive effects of development.

Cold Lake Discussion Paper; Carcajou Research Ltd., November 1984.

Purpose—To determine what should be done at the community level to prepare for and accommodate unforeseen growth in the population.

Human Services in Wabasca/Desmarais; A Review; Bairstow and Associates Consulting Limited, November 1984.

Purpose—To describe and inventory the human service delivery system, to identify service gaps and delivery problems and to develop a community-based strategy to resolve major issues identified.

Fort Chipewyan Tourism Industry: A Plan for Development; Manecon Partnership, March 1984.

Purpose—To research the possibility of strengthening the tourism industry in Fort Chipewyan.

Opportunities for the 80's: A Community Study for Swan Hills; Nichols Applied Management, April 1983.

Purpose—To identify appropriate economic development strategies and implementation of action programs which could strengthen and expand the local economic base.

Appendix D

Terms and Definitions

The following is a select list of terms as defined in the Survey Research Manual produced by Alberta Recreation and Parks. See the bibliography for more detail.

Bias:

A biased question is one that influences people to respond in a way that does not accurately reflect their position on the issue. Some people are aware of the bias and may be affected negatively by it, so they may not answer the question truthfully. Other people may be unaware of the bias and may then be influenced to respond in the direction encouraged by the wording of the question or the gestures of the interviewer.

Closed-ended Questions:

A closed-ended question presents a problem or issue and provides alternative answers from which the respondent can choose the answer that best reflects the respondent's situation. The answers that the respondent can choose from should be mutually exclusive and exhaustive.

Closed-ended questions are quite easy to code. There are many types of closed-ended questions.

1. Multiple choice: Several choices of answers are listed. The respondents record their answers by placing a check mark or number in the appropriate blank, or by circling the correct words.
2. Checklists: Checklists are used when more than one answer may be correct. Checklists indicate the presence or absence of something.
3. Ranking: The respondents must arrange all the given answers in order according to some specified level.

Codebook:

A codebook is a document that describes the location of items from the questionnaire in the survey data file and the specific labels that make up those items. A codebook acts as a guide for coders as they prepare questionnaire responses for coding and for locating items in data files during the analysis.

Coding:

Coding is used to assign numbers to identify responses and response categories to make the task of tabulation easier. Coding may be done manually on paper for hand tabulation or prepared for computer analysis by keypunching the codes onto cards or typing the codes into a computer terminal to transfer onto a magnetic tape.

Confidence Level:
The practitioners can express the accuracy of the sample statistics in terms of their level of confidence that the statistics will fall within a specified interval. For example, '95% confidence' is often used.

Confidentiality and Anonymity:
An anonymous study is one in which nobody (not even the practitioner) can connect returned questionnaires to the names of those completing them. A study is confidential when the practitioner knows who has responded to each questionnaire and yet promises not to reveal this information to other people.

Cover Letter:
Cover letters should be short and to the point and accompany any survey sent through the mail or hand-delivered. The cover letter should include: the purpose, objectives and rationale of the study; a description of how the persons were selected; a statement of the level of confidentiality and/or anonymity; an introduction of the researcher; identification of the sponsoring organization; deadline date; instructions for returning the questionnaire if necessary; and a 'thank you' to the respondent.

Cross-tabulation:
Cross-tabulations are used to examine the number of cases that occur jointly in two or more categories by integrating the responses of two or more questions. Cross-tabulations explain rather than describe data.

Exhaustive:
The practitioner should try to include all possible answers to a question. If a practitioner feels he has left out some possible answers, he should include a 'don't know' or 'other, please specify' category, so that every respondent can answer.

Filtering Questions:
Filtering questions are those which direct some but not all respondents to skip one or more questions on the answer they provide. Special instructions are required for filtering questions.

Follow-up Letters:
Follow-up postcards or letters constitute one of the best methods for increasing the response rate. Generally, two follow-ups are planned for a mail-out questionnaire. The first follow-up usually follows the questionnaire in two or three weeks. The first follow-up is a letter that encourages those people who have not responded

to do so and thanks those who have responded. The second follow-up should also include another questionnaire. Both follow-up letters should include basically the same material as the cover letter.

Leading Questions:
Leading questions are those that are worded in a way that strongly influences the respondents to give a certain answer. They lead the respondents to a particular reply. Leading questions do not elicit accurate answers.

Literature Review:
A review of the literature on the specific research topic should be completed to determine what information is available and what information is not available. A literature review can aid the practitioner on previous methods of data collection and areas that have or have not been researched. Sources of information are libraries, agencies and statistics.

Loaded Words:
Loaded words are those which spark immediate positive or negative feelings in the respondents. The danger is that the respondents will react more to the words than to the question.

Mutually Exclusive:
The categories in a question should be clear and not overlap. In some cases, questions are worded in a way that requires respondents to give more than one answers when only one is required.

Open-ended Questions:
Open-ended questions allow the respondents to answer with their own words. Open-ended questions are best used in the exploratory or design stages or when studying complex issues such as attitudes and opinions. Open-ended questions do, however, present problems when it is time to code.

Pre-tests:
In pre-testing, the practitioner sends the questionnaire to a sample of people as similar as possible to the people who will be receiving the actual questionnaire. The practitioner also sends copies to other people, such as experts in the research field.

Random Sampling:
A random sample is defined as a sample which has been selected from the population by a process which assures that each possible sample of a given size has an equal chance or being selected, and that all the members of the population have an equal chance of being selected into the sample.

Respondents:
Respondents are those who volunteer their time to cooperate with the practitioner by providing information about themselves or knowledge about certain issues. The practitioner's search for information should never harm the respondents in any way.

Response Rate:
To have the most representative survey, the response rate should be 100%. However, the response rate is often much lower. When the questionnaire is dropped off and picked up, if the response rate is between 30 and 40%, it is considered to be good. Unless a high response rate is obtained, the study results cannot be assumed to be representative.

Sample:
A sample is a subset of the population. In an experiment, for economical reasons, the practitioner usually collects data on a smaller group of subjects than the entire population. The smaller group is called the sample.

Surveys:
Surveys are useful for examining things that are not observable, such as opinions and attitudes, as well as for obtaining descriptive information about the respondents. There are four types of surveys that practitioners can use in their studies:

1. Face-to-Face Interview: A face-to-face interview involves a meeting between a respondent and interviewer who records answers to the survey questions.
2. Telephone Interview: In a telephone interview, the respondent is reached by telephone and the interviewer records the answers to the questions.
3. Self-Administered Questionnaires: In a self-administered questionnaire, the respondent is responsible for understanding the instructions and questions and recording his answers.
4. Public Meeting: Public meetings are open to all those affected by the issue under study. It is an opportunity to both give and receive information, to discuss issues and to reach an agreement. This is an informal method of gathering information and can only be analyzed by recording and examining the content of the discussions.

Tables:
Tables cross-classify two variables into rows and columns. A reader should be able to understand a table without referring to the text. Tables must have complete titles and headings to aid the reader in understanding what the tables mean.

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Canadian Public Health Association. **Guide to Questionnaire Construction and Question Writing.** 1986.

City of Edmonton Parks and Recreation. **Community Recreation Needs Study Manual,** January 1980.

Footnotes

1. Abbey-Livingston, Diane, and Abbey, David S. **Enjoying Research - A "How-To" Manual on Needs Assessment** (Recreation Branch, Ontario Ministry of Tourism and Recreation, Toronto, 1982), pp. 4-5.
2. Ibid., pp. 1-3.
3. Borland-Hart, Lois, and Schleicher, J. Gordon. **A Conference and Workshop Planner's Manual** Amacon, A Division of the American Management Association, New York, 1979), p. 6.
4. **Yes, You Can! Master Plan - Vol. 3: Community Participation** (Alberta Recreation and Parks), p. 3.
5. Ibid., pp. 5-6.
6. Adapted from **Survey Research Manual** (Alberta Recreation and Parks, October 1984), p. 86.
7. Adapted from Abbey-Livingston and Abbey, p. 48.
8. **Needs Assessment Handbook: A Close-up Look,**Volume 1, Alberta Culture Library Services Branch. September 1985.
9. Borland-Hart and Schleicher, p. 21.
10. Adapted from Abbey-Livingston and Abbey, pp. 89-99.
11. **Needs Assessment Handbook: A Close-up Look,** p. 27.

COMMUNITY SURVEY HANDBOOK

TECHNICAL "HOW -TO" GUIDE

Northern Alberta Development Council

TECHNICAL

"H O W T O"

GUIDE

HOW TO ...   Page

HOW TO...
USE THIS GUIDE

The Community Survey Technical Guide accompanies the Community Survey Handbook. Its purpose is to provide more detail on specific survey techniques, in particular "how to" do the steps in the process outlined in the Handbook.

The Technical Guide provides general guidelines and tips in carrying out a survey. It is highly recommended, though, that you also refer to other resources. The library has a variety of books on all aspects of surveying. There may also be people in your community who have been through the survey process. They can serve as excellent resource people and can provide experienced guidance and advice. The appendix at the end of the guide lists other resource agencies you may want to contact.

A community survey provides you with good feedback on the concerns and issues of local residents and can help you plan to meet local needs. It also brings community people together to work toward a common goal or address a specific problem or issue.

Good luck in undertaking your survey.

HOW TO...
SET THE TIME LINES

A comprehensive planning schedule is crucial to the success of your project. One very effective method of planning is through the use of a Gantt chart.

The main feature of the Gantt chart is that the start and finish dates of all the tasks are depicted on an easy-to-see time scale or calendar. You can choose a time scale according to the number of tasks and the length of time you'll need to do them. For example, each column of the chart can represent a day or a week. The sample chart that follows is based on the timelines set by the Northview Community Recreational Survey, as identified on page 38-39 of the Community Survey Handbook. The horizontal line after each task shows when that task starts and finishes. Broken lines may be used to show work beyond the scheduled completion date.

Every member of the working committee should be provided with a Gantt chart, which they can use to follow the progress of the tasks they are responsible for. A blank master copy of a Gantt chart suitable for duplication follows on page 4.

'RTHVIEW COMMUNITY SURVEY

GANTT CHART

WHAT	WHO	WHEN	JANUARY				FEBRUARY				MARCH				APRIL					MAY				JUNE
			1	7	14	28	4	11	18	25	4	11	18	25	1	8	15	22	29	6	13	20	27	3
SUMMARIZE ISSUES	ALL																							
IDENTIFY RESOURCES	ALL																							
SELECT APPROACH	ALL																							
REVIEW MATERIAL	DON																							
DESIGN SAMPLE	MARK																							
DESIGN QUESTIONNAIRE	SALLY																							
PRE-TEST QUESTIONNAIRE	SALLY																							
ADMINISTER QUESTIONNAIRE	BILL																							
TRAIN VOLUNTEERS	BILL																							
DELIVER QUESTIONNAIRE	BILL																							
INTERPRET QUESTIONNAIRE	KEN																							
DRAFT RESULTS	KEN																							
PREPARE REPORT	KRIS																							
PRESENT DRAFT	KRIS																							
PRINT REPORT	KRIS																							

GANTT CHART

WHAT	WHO	WHEN																						

HOW TO...
SELECT A SAMPLE

There are three steps in selecting who you should get to answer your questions.

1. First define your population. This would be the complete group of people that you are interested in studying.

2. Which people of the group should be asked the questions? This is the sample; the sample is a subset of the population.

3. How should these people be selected? This is the sampling method.

Depending on your population size, you may want to survey everyone involved. For example, in the following groups, you can contact everyone so you don't have to decide who to leave in or who to leave out.

- Members of your organization
- Your board of directors
- Volunteers in your agency

Samples and sampling methods are used when you can't or don't want to survey every member in the group. For economical reasons, data is usually collected from a smaller group rather than the entire population. The following situations would require attention to both sample size and sampling methods.

- Your neighborhood
- Clients of your organization
- A whole town or city

In these cases, it is too costly and time consuming to survey or interview every member of the population. So, a sample is selected to provide the answers. The critical question is: how accurate is it to generalize the answers from your sample to your population? If 50% of the sample say they want a swimming pool, we can't be certain it means 50% of the population want a swimming pool. Obviously, the larger your sample, the more accurate your results would be.

The following chart is a general guide to how many people should be sampled, based on the population size.

Total Number in the Population	Sample Size
100 or fewer	all
101 to 300	2 out of every 3 people
301 to 500	every second person
501 to 1,000	every third person
over 1,000	370

Let's look at an example.

This case relates to the scenario in the handbook about the recreation survey in Northview.

Population	Total Number	Sample Size
Continuing Education Board	8	8
Continuing Education Staff	3	3
Present participants of recreation courses	71	71
Past participants of recreation courses	364	182
Adults of the community who may take recreation courses	1,430	370

Now that you've identified the number of people in your sample, how do you select which individuals you will survey? There are a number of different methods that can be used, some being more effective than others.[1]

Accidental Sample

This is the weakest type of sample but the easiest to get. A typical accidental sample is the "man-on-the-street" interview. The interviewer asks whoever comes along and is willing to talk. However, this can be a source of bias. For example, suppose you were doing a community survey and decided to interview 100 households. If you talked to whoever answered the door, the sample would be accidental. Children, mothers, fathers and babysitters could have answered the door. But, depending on the time of day, it's possible the majority of respondents could have been children or teenagers, neither of whom represent the whole community.

Reputational Sample

Rather than a sampling method, this is more a selection procedure. Here, the choice of who is interviewed depends on someone's judgment of who is and who isn't a "typical representative" of the population. Sometimes people are selected because of their reputations or because they are publicly visible or because they hold a particular position. Talking to the presidents or executive directors of organizations is a legitimate way to collect information but no claim should be made that the views of these people represent the views of the population.

Random Sampling

In a random sample, every member of the population has an equal chance of being selected and included in the sample. One way to do this is to divide the total number of people in your population (1450) by the sample size that you need (370). The resulting number (3.86) means your sample would consist of one in every four people. Then, you would go through the list of names choosing every fourth person until you had 370 names. The list you use would have to have every member of the population on it. It could be a taxpayers list, voters list or the telephone book.

Other Sampling Methods

There are also other methods of sampling.

For more information and details on sampling, you may want to refer to the resource appendix.

HOW TO...
DESIGN THE QUESTIONNAIRE

Asking the Questions

As we learn every day from our own conversations, people don't always answer the question we think we just asked. If we tape-recorded our conversations and then replayed them, we would realize how unclear some of our questions really are. In conversation, we rely on a number of factors to understand meaning: the words used, how well we know the other person, facial expression, hand gestures and tone of voice.

With a survey the questions have to be clear enough to stand by themselves. Therefore, it is important to choose words, phrases and sentence structure that are commonly used by the people who will answer the questions.

Although there are many ways of asking questions, a few are used most commonly. There are good reasons for their common use:

- Most people can understand the format of the question
- You can be fairly sure that you know what people mean by their answers

There are two main types of questions that are commonly used in personal, telephone and mail surveys:

- Open-ended questions
- Closed questions

Open-ended Questions

Example: What changes would you like to see in the services available at the Pinehurst Centre?

____

____

____

Open-ended questions invite the person answering the question to give whatever answer fits that person's situation. Answers to the above question could include anything from better lighting to keeping the library open on Saturdays.

Guidelines:

- Keep the questions short.
- Limit each question to one idea.
- Try filling in your own answer to see how much space to leave.
- Use open-ended questions sparingly.
  - The answers are slow for interviewers to write down.
  - People tend to dislike the time it takes to write out their thoughts on mail questionnaires. As a result, open-ended questions are often left unanswered.
  - Answers to open-ended questions are difficult to analyze.

Closed Questions

A question is closed when respondents must choose their answers from answers provided. There are three major types of categories for closed questions which are illustrated below and discussed in this section.

1. Nominal Type

   Example: Were you born between 1919 and 1938?

   ☐ YES

   ☐ NO

2. Ordinal Type

   Example: Please indicate your age group.

   ☐ Adolescent (age 9-12)

   ☐ Teenager (age 13-19)

   ☐ Adult (ages 20-39)

   ☐ Middle Age (age 40-55)

   ☐ Senior (age 60-80)

3. Interval Type

Example: Please indicate your age group.

☐ 11-30 years

☐ 31-50 years

☐ 51-70 years

Nominal Type

Questions using a nominal scale have categories of responses from which to choose. Sometimes there are only two categories ("yes" and "no") and sometimes there is a checklist of items.

Nominal scales are generally used to gather factual information; they do not measure degree of feeling, relative strength of opinion or frequencies of behavior.

Example: Have you ever attended any evening courses at Gallagher School?

☐ Yes

☐ No

Example: Are you eligible for a government grant to pay for child care?

☐ Yes

☐ No

☐ Don't know

☐ Not applicable

Example: Do you have all the information you need about vacation spots in our county?

☐ Yes

☐ No

If no, what additional information would you like?

____

(Please fill in)

Example: What was your <u>main reason</u> for becoming a volunteer?

- ☐ Have free time available
- ☐ Wanted to do something to help
- ☐ Wanted to meet new people
- ☐ Chance to learn skills that might lead to a job
- ☐ Other:______________________________
  (Please fill in)

Guidelines for Nominal Questions:

- Be sure all possible responses are provided. Add "don't know", "not applicable" or "doesn't matter" choices to yes-no questions, if these are possible answers.

- Ask a follow-up question to either a "yes" or "no" answer wherever you want to learn <u>more</u> than how many people said "yes" or "no" to the question, such as <u>why</u> people said "yes" or "no".

- Be sure the categories for response do not overlap, such as in the following example:

  Which activity do you do <u>most</u> in your leisure time?

  - ☐ Skiing
  - ☐ Skating
  - ☐ Hockey
  - ☐ Team sports

  Because "team sports" is so general, it overlaps with some of the other categories i.e. hockey.

- Choices for the answer are easiest to read when the blanks for answers line up vertically. They can be placed either before or after the choices.

Ordinal Type

In an ordinal scale question, the answers provided have a logical relationship to each other. We may not know precisely the difference between categories but we do know it is orderly.

Ordinal scales use categories such as:

☐ Always	☐ Strongly Agree	☐ Poor
☐ Often	☐ Agree	☐ Fair
☐ Sometimes	☐ Disagree	☐ Good
☐ Rarely	☐ Strongly Disagree	☐ Excellent
☐ Never	☐ No Opinion	

One type of ordinal scale questions is the "range-of-response questions". Another word for "range" is distance. This type of question allows you to give your answer somewhere between two extremes such as good and bad, or often and never. The choices are spelled out for you.

Example: How often would you have time to be a parent volunteer at the after-school centre?

- ☐ Once a week
- ☐ Twice a month
- ☐ Once a month
- ☐ Not at all

Example: How would you rate the safety of crossing the street in this area for young children walking to school?

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Poor

Example: About how many times did you personally use the community centre last winter (from December 1 to March 1)? Please check one response.

☐ More than 16 times

☐ Between 8 and 15 times

☐ Between 4 and 7 times

☐ Between 1 and 3 times

☐ Not at all

Guidelines for Ordinal Questions:

- Provide at least four or five alternate responses
- Ensure there are the same number of positive statements as negative statements. Keep the scale balanced to avoid bias.
- List the responses in a logical order
- Ensure there are no overlapping categories
- Include all possible responses. The respondents who do not have an opinion or have not made a decision need a category.
- This type of question can be used for interviewing even though there are more than three possible answers. Because the answers are related, they are easier to remember than in the checklist-type example. Even so, the interviewer may need to repeat the answer options before the person answering can choose the answer they wish to give.

Interval Type

An interval scale not only has a logical ordering like an ordinal scale, but it also has equal distances between each category.

Example: What do you think the monthly operating cost for the arena are?

☐ $1,000 - $1,499

☐ $1,500 - $1,999

☐ $2,000 - $2,499

☐ $2,500 - $2,999

The most common interval scales are those dealing with age, income, years, etc.

Guidelines for Interval Questions:

- Make sure that each category is the same size i.e. if your first category is 1 - 9 then your next must be 10-19.
- Make sure there are no overlapping categories i.e. do <u>not</u> have categories 1-10, 10-20, 20-30.

Checklists

A fourth type of closed questions allows the respondents to make several choices: checklists. A checklist is used when there is more than one alternative that may be correct for a respondent.

Example: How did you hear about this workshop?
(Check all that apply.)

☐ Newspaper

☐ Radio

☐ Promotion brochure

☐ Grocery bag leaflet

☐ Other ______________________
(Please fill in)

Example: Some of the activities of XYZ Seniors Groups are listed below. We would like to know whether or not you want more information about these activities.

	I do <u>not</u> want more information	I <u>do</u> want more information
Current Events Discussions	☐	☐
Day Excursions	☐	☐
Volunteer Grandparents	☐	☐
Craft Courses	☐	☐
History of Canada	☐	☐
Bridge for Beginners	☐	☐
Psychology Courses	☐	☐
Modern Theatre	☐	☐

Guidelines for Checklists:

- The list should include all possible answers. If it is impossible to list them all, the category "other" should be provided.
- The list should not include overlapping items.
- On mail questionnaires, include the direction check all that apply for questions where more than one answer is possible; otherwise, some people will check only one answer and that could mean either they thought only one answer was expected or they only had one answer to give.
- This type of question brings us to one of the differences between mail-type surveys and interview-type surveys.

  A rule of thumb for planning interviewing is that people can't remember more than three different choices of answer very easily. Therefore, the common practice is for the interviewer to ask the question and then check off the answers on the survey which are closest to the ones given by the person being interviewed, rather than reading off all the possible answers.

  In interview-type surveys, a format that is easy for the interviewer to follow has the interviewer's words in CAPITALS and instructions to the interviewer in brackets (). The following example is the interview format of the previous example.

Example: HOW DID YOU HEAR ABOUT THIS WORKSHOP? (Follow the answer with a question:) WERE THERE ANY OTHER WAYS YOU HEARD ABOUT THIS WORKSHOP? (Check all answers given.)

☐ Newspaper

☐ Radio

☐ Promotion brochure

☐ Grocery bag leaflet

☐ Other ______________________________
(Please fill in)

Background Questions

Usually there are some parts of a person's background that help to explain the answers that he or she gives to survey questions.

The answers to background questions also make it possible to describe the people who answered the survey.

Because these questions can easily offend by asking for information that is often kept private, it is important to ask only those questions whose answers are truly needed.

The way questions are worded can also help to avoid offending people by asking for general, rather than specific, information. For example, you can ask what age group the person fits into rather than what their age is.

Here are some standard ways of asking background questions.

Age

Example: Which age group are you in?

☐ under 25

☐ 25 to 45

☐ 46 - 65

☐ over 65

Guidelines to "Age" Questions:

- Adjust groupings according to the needs of the survey.
- Avoid groupings that end in 30s, 40s, 50s, etc. Some people don't like to admit they've passed an age ending in zero.
- Number groupings should not overlap as they do in the following example because they provide two choices for people aged 35.

  ☐ 25 to 35

  ☐ 35 to 45

Location

Example: Do you live closest to

☐ Hythe

☐ Beaverlodge

☐ Grande Prairie

Guidelines to "Location" Questions:

- Choices should relate to the survey concern. Town quadrants (NE, NW, SE, SW), townships, or kilometres from a fire hall, for example, may be more appropriate than town names.

The following background question topic areas can create anxiety and should be avoided if at all possible:

- Marital status
- Employment status
- Nationality
- Income bracket
- Level of education completed

Usually there is another way of asking what you actually want to find out instead of asking for any of the above personal information directly. For example, do you really need to know if a person is employed or is the question you need answered, "Did you find a job after you finished your training program?"

HOW TO...
DESIGN THE QUESTIONNAIRE

Wording the Questions

There are a number of factors to keep in mind when you are designing your questionnaire. The following points highlight key areas to be aware of as you write your questions.[2]

Loaded Words

"Loaded" words or phrases are ones that stir up immediate positive or negative feelings. "Drugs", "strikes", and "vandalism" are loaded words. When loaded words are used in questions, people react more to the words than the issue the question is addressing.

When loaded words are used, the researcher does not know what part of the question the respondent is reacting to. Consider, for example, the following question:

Example: If there was an election tomorrow, who would you vote for?

☐ Sam Smith, our present mayor

☐ John Jones, the present challenger

If respondents are not familiar with the candidates, they may be influenced by generalized attitudes. Some might indicate Sam Smith because they favour stability, experience in a job, etc. Others may choose John Jones because they are in favour of change, or because they sympathize with an underdog, or for other reasons not directly related to the candidate himself. The information provided wouldn't be helpful because you would not know what part of the question is being responded to.

Often the names of organizations, political parties, people or groups are "loaded". When a question starts with a phrase such as, "Doctors say...", some people will be drawn to agree just because they trust what doctors say. Others will disagree simply because they are skeptical about medicine and doctors.

To ensure your questions are clear and unbiased, you should always test them with a small group before you actually use them. How to do a pre-test is discussed later.

Loaded Questionnaires

When all the questions in the questionnaire are written, the questionnaire as a whole should not reflect a bias on any issue. Each section of the questionnaire should be neutral. To do this, both sides of an issue should be asked about, the positive and negative features of a program should be addressed, and on important issues, questions should be asked from both a positive and a negative perspective.

You also need to provide balance when you use open questions. Always ask at least one question on each side of an issue or idea. The examples below could be used in mail questionnaires or in telephone or personal face-to-face interviews.

- What are the strengths of the provincial association?_______
- What are the weaknesses of the provincial association?_______
- As you see it, what factors have contributed to the success of program X?________
- As you see things, what factors have blocked program X from success?________
- What do you hope happens at our conference?________
- What do you hope does not happen at our conference?________

Leading Questions

People sometimes respond to questions on the basis of what they think is the interviewer's answer, or on what is the socially-desirable answer. These responses happen because of the human tendency to want to look socially-acceptable, successful, knowledgeable, fair, helpful, intelligent, a good citizen. This tendency is so strong that people are reluctant to admit they don't know the answer to a question, or that they don't do things they say others should. On questionnaires, people will tell you they voted in the last election, brush their teeth twice daily, buy church raffle tickets, read the daily papers, enjoy the best-selling books, etc. Often these answers are not exactly true.

The way we ask our questions can lead the response.

Example: Are you in favour of extending services to seniors?

Example: How much time did you devote to your child's homework last week?

To disagree with the first question is like voting against motherhood. The second question not only assumes the respondent did spend some time on the child's homework, it also uses a loaded word "devote". For some respondents to answer "I did not spend any time" would almost be admitting "I am not devoted to my child".

Vague Words and Phrases

This is a tricky area because sometimes you want to be deliberately vague to explore ideas. At other times, vagueness will be confusing to the respondent and/or the results will be confusing to the interviewer.

The following are some common vague phrases that should not be used.

Example: How often have you used the Information Centre in the last month?

☐ Never

☐ Sometimes

☐ Often

☐ Always

The categories of response for this question are too vague. Also, the word "you" may be taken to mean "you, personally", or "you and your family". When the word "you" is used, always specify to whom it refers. Here's a better way to ask the same question.

Example: In the last two months, how often have you personally used the Information Centre?

☐ I NEVER HAVE

☐ I HAVE USED IT LESS THAN TWO TIMES

☐ I HAVE USED IT THREE TO FOUR TIMES

☐ I HAVE USED IT MORE THAN FOUR TIMES

If the question refers to a specific time, it is wise to specify it.

- "1989" instead of "in the last year"
- "July and August" instead of "During the summer"
- "6:00 p.m. on" instead of "Evenings"
- "A few times, once a month", etc., instead of "Rarely, Never, Often"

Complex Questions

Sometimes you can't remember what you did last week, yet surveys have been known to ask people to remember details from last year. Some types of detailed information are hard to get.

Example: How many books did you borrow from the Public Library during 1989?

______ books.

Many respondents will not be able to remember this information. The questions are so mentally demanding that respondents may develop negative feelings about completing the questionnaire or interview. The question would be better phrased as a series of closed questions.

Example:

1. Have you borrowed any books for yourself or your family from the Public Library since January 1989?

   ☐ YES -- please answer question 2

   ☐ NO -- please go directly to question 4

2. Approximately how many books have you borrowed?

   ☐ LESS THAN 10 BOOKS

   ☐ 10 TO 20 BOOKS

   ☐ 21 TO 30 BOOKS

   ☐ 31 TO 40 BOOKS

   ☐ MORE THAN 40 BOOKS

Mentally-taxing questions often appear when surveys want to know how people spend money and time, or details of their past. This places unnecessary demands on the respondents unless questions are sequenced in an order that helps them recall and answer sequential pieces of information involved in the question.

Checklists that are too long and ranking questions with more than eight to ten items, place heavy demands on respondents. Similarly, a long series of attitude questions will tax respondents. With these types of questions, even an interested, willing respondent can suffer mental fatigue and be unable to give full attention and consideration to each item or question. When this happens, "No Response" and "Don't Know" answers increase and the quality of information you receive is low.

Offensive or Threatening Questions

Some questions can offend respondents so much that they may answer dishonestly or even refuse to answer the question. One reason they may be offended is that a personal question may be seen as an invasion of privacy. For some people, the following may be an offensive question.

Example: Have any of your children been involved in acts of vandalism (destruction of public and private property)?

☐ Yes

☐ No

These questions can be asked in a less objectionable way by either providing an introduction or background to soften the question or asking a series of questions starting with general opinion questions.

Example:

1. As you may know, there is some discussion about vandalism in this community, and there are questions as to how it should be handled. Some people feel it is a serious problem: others feel it is not a serious problem. How about your opinion? Do you consider vandalism to be a serious, moderate, slight, or no problem in this community? (Check off the box beside your answer.)

   ☐ SERIOUS PROBLEM

   ☐ MODERATE PROBLEM

   ☐ SLIGHT PROBLEM

   ☐ NOT A PROBLEM

   ☐ NO OPINION

2. During the last few years, do you think the incidence of vandalism has increased, stayed the same, or decreased in this community?

   ☐ INCREASED

   ☐ STAYED THE SAME

   ☐ DECREASED

   ☐ NOT KNOW

3. Do you personally know anyone who has been involved in destroying public or private property?

   ☐ Yes

   ☐ No

4. Have your children ever been involved in destroying public or private property?

   ☐ Yes

   ☐ No

Inappropriate Questions

Perhaps the most costly error of all in writing questionnaires occurs when the researcher has forgotten or overlooked the purpose of the research and the specific information that needs to be collected. This frequently occurs when people jump into writing questionnaires before clarifying how the responses will be used. When this happens, a lot of information might be collected that is "nice to know" but not necessary or, even worse, the needed information might be missing.

Each question used should have an explicit rationale for being in the questionnaire. You must know why the question will be asked and what will be done with it.

HOW TO...
DESIGN THE QUESTIONNAIRE

Ordering the Questions

Once you have designed the questions to get the answers you need, it is important to ensure the questions are in a logical sequence and are easy to follow.

- Organize the survey by grouping the questions related to each topic. Deal with one topic at a time.

- Aim for a logical flow from one question to the next where possible. For example, ask whether people have pre-school-aged children before asking whether they need day-care.

- Start with simple questions that are easy to answer to arouse interest. Go from:

  - General questions to specific questions
  - Easy questions to difficult questions
  - Impersonal questions to personal questions

- Place background questions last in the survey. That way, any negative feelings about the background questions do not carry over into answers to the main questions.

- For "GO TO" instructions where people are directed to skip questions if a topic does not relate to them (see example), be sure the numbers people are directed to are correct. Question numbering can easily get confused during the revising stage.

  Example: Do you have any family antiques to contribute to the museum collection?

  ☐ NO (GO TO question 13)

  ☐ YES (GO TO next question)

- Identification of the person giving the answers is handled in one of two ways. You can either use identification numbers placed in the upper right-hand corner of the first page or ask the person to give their name and phone number or address at the end of the survey. Since people will feel freer to answer with an identification number than with their name on the survey, only ask for names if you must have them for some reason.

Laying out the Questions

The final touches to your questionnaire revolve around how it is laid out. A survey that looks good and looks professional will get a higher response rate than one that looks poor. The survey also creates a first impression of the community group, so plan carefully. The following points may provide you with some tips.

Organization

Personal and Telephone Interviews

Personal or telephone survey forms generally have the introduction on the first page of the survey.

The introduction should include:

- The interviewer's name
- The title of the survey, the group who are having it carried out and the reason the survey is important
- Who is being asked to answer the survey and if their answers will be confidential
- Approximately how long the interview will take and whether this is a good time for the interview

A cover page for interviews is helpful for both the interviewer and the survey manager to keep track of progress on each interview. It can include:

- Name of the interviewer
- Name and address or phone number of the person to be interviewed
- Day and time of first contact if necessary
- Day and time of second or third contact if necessary
- Space for a suggested call back time
- Final interview status: completed, refused or no answer after three attempts
- Identification numbers of people who are interviewed should appear both on the cover page and on the interview form

Mail Questionnaire

A mail survey package includes:

- An introduction or introductory letter
- The survey letter itself
- A stamped, addressed return envelope

An introductory letter can carry a lot of weight, especially if it is printed on letterhead and is signed by the head person who has access to the letterhead. This could be the director of an agency, the mayor of a town or the president of a society.

Information to include in the introduction would ideally be:

- The title of the survey, the group who is having it carried out and the reason the survey is important
- The purpose of the survey and the importance of participation
- Who is being asked to answer the survey and if their answers will be confidential
- When the survey will be completed, where the results will be available and what it will be used for
- Deadline for mailing back completed surveys
- Name and phone number of the person to contact if there are any questions

<u>Length</u>

- The ideal mail out survey is two to four pages long. A shorter survey may not appear serious enough to answer. A longer survey may be set aside for answering at another time.
- Back-to-back printing makes the survey seem shorter, but sometimes people omit filling in the backs of one or more pages.
- Reducing the size of the print to get more questions on a page only works to make the survey seem shorter if the print is still easy to read and if there is adequate space for filling in answers.

- The best solution to a long survey is to review the questions and remove the ones whose answers will provide the least help.

Type

- Type should be easy to read. Size of type, space between lines, and clear type all influence how easy a page is to read. Leave lots of white space.
- Use underlining, capitals, boldface, double and single spacing in a consistent way to set apart instructions, questions and spaces for answers.
- Leave adequate space for answers. Check by completing a copy of the survey yourself.

Printing

- Print 10 - 15% more surveys than you plan to use so you have extras for call backs, etc.
- Choose paper, type and copy method carefully, particularly for mail out surveys.
- If you have the budget, have your questionnaire copied by a professional printer. This will add to the look of professionalism of your form.

HOW TO...
CONDUCT THE PRE-TEST

Whatever form of questionnaire you will use, you can be sure of one thing: it will need corrections and revisions to make it work effectively. A pre-test is an evaluation of the questionnaire before it is used to ensure its effectiveness. You could be under strict timelines and feel you can't afford the time to pre-test; in that case, you may want to re-evaluate whether or not you should conduct a survey. A survey tool that is not effective is not much use. It is important to take the time and ensure you are getting reliable and valuable information.

A pre-test will address a number of questions:

1. Can the instructions be followed as they stand or do they require further explanation?
2. Are all the questions/words understood?
3. Are there any questions that are unclear or confusing?
4. Do the questions ask what they are intended to ask?
5. Are the questions interpreted as they were intended and interpreted similarly by all respondents?
6. Are there questions people do not know how to answer or do not wish to answer?
7. Do the questions seem relevant to the problem or issue you are studying?
8. Does there appear to be any bias in the questions?
9. Does the questionnaire create a positive impression and motivate people to answer it?
10. How much time is required to complete the questions?

Four types of people should take part in scrutinizing the questionnaire during the pre-test:

- Colleagues
- Research experts
- Potential users of the data
- Cross-section of potential respondents

The first three groups can provide valuable feedback. Your colleagues can comment on how well the questions accomplish the study objectives. Experts in the field of research may have suggestions that could increase the rate of response or clarify any question areas that appear vague. Potential users of the information would have thorough knowledge of the topic area and could check for accuracy and lack of bias.

At this point, you will have checked your questionnaire with a small group of people who are willing to help and you have probably made some changes and revisions. This is not enough. NEVER assume that because you and your colleagues understand your questionnaire, that your respondents will too. Colleagues and friends are well-meaning but (a) they are too kind; (b) they are not the same as the people in your sample; and (c) they may have heard you discuss your study, which would help them understand your questions.

A pre-test with potential respondents is critical. It can examine any areas on the questionnaire that may confuse the respondent and can suggest and raise points that perhaps were overlooked. You will want to pre-test with a small sample of perhaps 20 to 100 people, depending on the sample size of the main survey. This random sample should be similar to the actual sample population and include people who know nothing about the survey background.

Contact each of the people by telephone first to explain the help you need from them, and ask for their assistance. Conduct the survey as you plan to, either by personal interview, telephone interview or by mail. After the survey, ask for their reactions and spend time getting answers to the above questions. In the mail-out questionnaire, you can either follow-up with a phone call to the respondent or leave room on the form for people to provide their comments.

When analyzing the results of the pre-test, look for questions with a high degree of consensus, large numbers of "don't know" or "no opinion" answers and incomplete answers. Eliminate or revise these questions for the final draft.

After doing the pre-test, use your feedback. Go back to the drawing board. Revise and clean up the form. If substantial changes were made from the first draft, do a second pre-test on the second draft.

To summarize, pre-testing includes the following steps:

1. Obtain feedback on the draft questionnaire from colleagues, research experts and those who will use the data

2. Revise the draft

3. Present the questionnaire to a small sample of potential respondents in the manner you plan to use, such as mail, telephone or in-person

4. Obtain comments from the respondents

5. Revise the questions that caused difficulty

6. Re-test

7. Prepare final draft

HOW TO...
TRAIN THE SURVEYORS

Whether your plans are for telephone surveying, personal interviewing or door-to-door surveying, the surveyors require some training to understand the survey process. It is important that they know:

- The survey background
- The survey objectives and purpose
- General information on the sponsoring organization
- What to expect in the field
- How to answer questions from respondents

Appendix D has a list of helpful hints for surveys that were used during a community survey in Beaverlodge.

Mail Questionnaires/Drop-Off - Pick-Up Questionnaires

In these types of surveys, there is minimal contact between the respondent and the individual who mails or drops off the form. The questionnaire administrators must still be able to provide information on the general points noted above in case of queries.

Telephone and Personal Interviews

The interviewers in these types of surveys must have well-developed interpersonal skills. They should be pleasant and have good listening skills.

Before selecting your interviewers, you may want to interview them to see them operate in a situation similar to what they will be asked to do. Talk to a potential telephone surveyor on the telephone to get an idea of voice and manner. All interviewers will need to be politely persistent.

Both telephone and in-person interviewers will need to have a training session. The training should include information in the general points noted previously, as well as:

- The nature of the survey and its purpose
- What the results will be used for
- How the sample was selected
- How long the survey should take

The surveyor will need to be intimately familiar with the questionnaire. Go through the form thoroughly, ensuring the questions and coding sheets are understood. Identify the types of answers that could come up.

The training should include practical situations - both through role plays <u>and</u> actual interviews in the field with people similar to, but not the same as, the sample. It is very convenient to combine interviewers training and practice with the pre-testing of the questionnaire.

In the practice interviews, you may want to bring in extra people so that each interviewer will have someone with whom to practise. Give the interviewers your questionnaire and have them conduct the interview as if it was the real situation. If possible, record the interview or arrange for someone to observe each interview.[3]

There are specific speech behaviors to watch and listen for:

- Tone of voice
- Speed
- Energy level
- Clarity

These "cues" will often influence the respondent without the interviewer or respondent realizing it. If your interviewers skip across some questions and linger over others, it is important to find out why this happens. Are some questions boring to the interviewer? Do some questions cause embarrassment or anxiety? The interviewer's attitudes and feelings can be communicated quite subtly and they <u>will</u> influence the respondent. There is nothing more discouraging than finding out after the study is over that your respondents were influenced by the interviewer and your research results are biased.

Check for leading statements and fast closure. Interviewers - sometimes unknowingly - shape the respondents' answers either by suggesting answers they personally favour or by moving quickly to the next question when they hear something they don't favour. These influences are often nonverbal. The interviewer may unwittingly "reward" some responses by smiles, nods of agreement, or change in tone of voice. They may "punish" other responses by simply not reacting, by puzzled looks, or by sighs.

Note what the interviewer writes down compared to what the respondent said, based on tape recordings or what the observer saw. If an interviewer is asked to record <u>exactly</u> what the respondent said, verbatim, then notes that just give a sense of what was said will not be good enough. What's left out of an interviewer's records might actually be a source of bias. What an interviewer adds (thinking it was said, or trying to clarify what the respondent meant) is also a source of bias. Sometimes, in comparing two records of the same interview, you'll discover the interviewer has systematically - but unconsciously - distorted what was said to fit what he or she thinks the question means or what the respondent meant.

Sometimes the interviewers fail to record something because they think the information is so basic it can be taken for granted. All these behaviours will distort the information collected.

Check that interviewers understand how to probe for more information and how to clarify responses. Give them examples of neutral probes like "Could you say more about that..." "I'm not certain I got exactly what you meant. Could you tell me again?" or "May I repeat what I wrote down so you can check that I have everything you want to say..."

Training interviewers is critical to the success of your study. It's also important that you supervise them on a regular basis to check if they are having any problems, and to read their completed interviews.

Practice-interviewing should give interviewers an opportunity to deal with such typical statements as:

- <u>I don't know about the topic so please interview someone else.</u>

  The interviewer should not contradict the respondent, but should reply, "The focus of this survey is how people feel about ABC rather than what they know. Whatever information you can give us will be helpful. Perhaps if I read you a couple of questions, you'll know what I mean..."

- <u>I'm too busy.</u>

  The interviewer should acknowledge that he or she may have interrupted the respondent, explain how long the interview will take, and ask when to call back. It would be preferable if the interviewer could call ahead to set up an interview time that is convenient. Explain how long the survey should take so the respondent can schedule the time.

- <u>I don't believe in surveys.</u>

  The interviewer should acknowledge that sometimes surveys take a long time and no one sees the results, and then repeat how the results will be used, the importance of the study, and offer the respondent feedback from the study.

- <u>That question is ridiculous.</u>

  The interviewer should not dismiss the respondent's comment or rush on to the next question. Instead, record the respondent's comments, criticisms, and suggestions, and assure the respondent that his or her comments are being taken seriously. In fact, if the early returns of a study show a lot of criticism, anger, or anxiousness, researchers should review the interviewer's introductory comments and the questions being asked.

- <u>This is an invasion of my privacy. It's nobody else's business what I think.</u>

  The interviewer should describe and clarify the measures that have been taken to ensure confidentiality and that names do not appear on the questionnaire.

- <u>Who is sponsoring this research?</u>

  The interviewer needs to know what to say about the sponsoring and funding agency. In market research, it is often important not to identify the specific company that is asking for the information, so a broad term is used, for example, "Ski areas want this information" or "An agency working with volunteers" might be used.

Sometimes, typical respondent statements and the appropriate interviewer responses are typed out and given to interviewers. This back-up material will help the interviewer to feel prepared and supported. In addition, interviewers should have written information on the purpose of the study, who respondents can call for further information, how respondents were chosen, and if and when a copy of the results will be sent to respondents.

HOW TO...
COLLECT THE ANSWERS

Personal Interviewing

Getting Set

The ideal to aim for in interviewing is to carry out all interviews exactly the same way so that the people being interviewed:

- All have an equal chance to answer the same questions
- All are given the same answers to questions they ask about the survey
- All are interviewed in the same manner

Approaching the Person to be Interviewed

Each interviewer is provided either with a list of addresses or given more general instructions such as: carry out an interview at every second house.

The interviewer needs to know if there are any restrictions on the person that is to be interviewed at each house. For example, eligible people might be:

- Anyone over 18
- Anyone who lives in the house (not a visitor)
- Anyone who is a parent

If no eligible interviewees are at home, the interviewer records the time of the attempted interview and returns at a different time of day to complete the interview. Usually, about three attempts are made to complete an interview. Rather than dropping in, the interviewer could pre-arrange an interview time and schedule the interviews. This may take a little longer to set up but would be a more effective use of interviewer time.

If the interviewee is at home, the interviewers would go through a process which would include:

- Introducing themselves
- Explaining the reason for the visit
- Providing background information on the survey and the sponsors
- Explaining the length of time required for the interview itself to ensure there is no misunderstanding

Name tags with picture identification may prove useful for the interviewers. These can be obtained through a vehicle licensing branch, which may be able to laminate them as well. A contact number should be readily available should an interviewee want to verify. The delivery/interview schedules should be kept track of and be provided to a survey coordinator.

Carrying out the Interview

Since the point of a survey is to learn what the person being interviewed has to say, it is important for all interviewers to:

- Avoid suggesting answers
- Avoid giving opinions
- Avoid showing any reaction to answers

Interviewing is demanding work. The interviewer needs to listen closely to every word that is said and either check off the closest answer provided on the survey form or write down the person's answer where the question is open-ended. The interviewer also needs to keep up the pace of the interview so that the person being interviewed does not lose interest.

Keeping Notes Up-to-Date

Interviewers need time at the end of each interview, or each day of interviewing, to review the interviews. Sometimes handwriting needs to be clarified or short forms written out in full so that the person who analyzes the interviews can understand what was said.

Respecting Privacy

Interviewers must agree to keep the confidence of all the people they interview. Comments about such things as the conditions of the house or the treatment of children are not acceptable and could reflect badly on the sponsors of the survey. Also, in the future people may decline to participate in a survey to protect their privacy.

It is very tempting to tell friends over coffee some of the things people say during interviews. The only place where these stories belong is at the debriefing sessions held by the survey coordinator. Interviewers can share their experiences at these sessions and the coordinator can work out standard ways of handling any interview problems that are reported more than once.

HOW TO...
COLLECT THE ANSWERS

Telephone Interviewing

Most of the section on personal interviewing applies to telephone interviewing as well, although there are a few differences. Telephone interviewers are provided either with a list of names and phone numbers or are assigned specific pages of the phone book and asked to call every fifth private number, for example.

Telephone interviewing is often done from private homes. In these cases, interviewers need to plan for uninterrupted interviewing time and ample work space for separating and stacking:

- Completed surveys
- Numbers to be called again at a specific time
- Numbers to be tried again where there has been no answer so far
- Refused interviews
- Blank surveys
- List of names to be called

Telephone interviewers quickly learn by trial and error what time of day the group of people they need to interview is near the telephone. Interviewers are advised to avoid leaving a message for people to call back; people calling back will be unable to reach the interviewer if an interview is underway and it is often a waste of interview time to not use the phone while waiting for a call-back.

Mail Questionnaires

Arrange for the mail-out of all surveys to allow about five business days for people to complete. Ensure a date for returning the questionnaire is provided.

It is most efficient to keep all returned survey envelopes unopened in a box and then open and check off the returns against the mailing list all at one time.

Keep track of the number of returned surveys received each day. That way you can see the pattern of returns and can stop waiting for further returns when there have been only one or two a day for a week.

Group Discussions

As was mentioned in the handbook, there are two group discussion methods:

- Focus groups
- Public meetings

To re-cap from the handbook, a public meeting is an open meeting where anyone interested in the topic can attend and share his or her views. A focus group is a more systematic process. People with specific backgrounds are invited to attend and a focus-group facilitator leads the group through a specific process.

Focus Groups

In a focus group, six to 12 people are invited to attend[4]. The group would all meet around a table in a room free of distractions. Each person should be provided with paper and pencil. The room should be well-equipped with at least one flipchart, and a chalkboard or whiteboard.

The group facilitator leads the process. The facilitator need not be the official leader of the group, for example, the chairperson of the sponsoring organization. Rather, the facilitator should be selected on the basis of leadership skills, communication and interpersonal skills and discussion group skills. Anyone with these strengths from within the community would be a good choice. It is important that this person be seen as having no bias toward any side of the issue being discussed.

It is a good idea to also have an official recorder who can write down the ideas that are discussed on a flipchart or blackboard. This person should also be neutral, have legible handwriting, and be able to summarize points and pick out key ideas.

The "focus" of the groups' discussion is a clearly worded question or problem which has been previously decided on. This statement or question could either be written on a handout and distributed to group members and/or it could be written on the chalkboard or flipchart. An example of a focus group question, to use the situation in the handbook of Joy's Recreation Board in Northview, could be:

> What information does the recreation board need about the recreation services, the community and the people who live here, to make an informed decision about enhancing recreation services?

The group leader starts the process by:

- Introducing himself/herself
- Providing background information on the survey and the sponsors
- Explaining how the participants were selected
- Leading introductions
- Providing information on what will be taking place in the meeting
- Answering any questions

Once everyone is comfortable with the process, the focus group begins.

There are different approaches that can be used to lead the discussion. Possibilities include:

- Asking each person to write their own answers to the question and then compare answers
- Brainstorming as a group possible answers to the question
- Dividing the group into two and asking each half to develop points either for or against the issue and then compare notes

In the document Needs Assessment Handbook: A Close-Up Look, developed by the Library Services Branch of Alberta Culture, a detailed step-by-step process is outlined using the first approach, whereby the group writes down their answers individually and then compares. That process is outlined below[5]. It will serve as a guide, and can be adapted to other approaches.

The process begins with the group leader explaining what will happen during the meeting, stating the question and giving the necessary instructions. Each person is asked to write down on paper all of the answers to the stated question. At this time, there is no discussion within the group; the emphasis is on individual concentration.

Following this step:

- The leader asks each person in turn to contribute, without discussion, one idea from his or her list of answers

- The recorder writes each idea on the chalkboard or easel clearly and concisely, using the contributor's own words wherever possible

- When each group member has contributed one idea, the process continues until every item on each list has been mentioned and recorded in front of the group

- No discussion or evaluation of the suggestions takes place until all of the ideas are written down by the recorder

The group now has a large list of ideas which have been given as possible answers to the stated question. Discussion begins as each idea is examined in a systematic order. Participants may ask for clarification of the ideas, and points for and against any given idea may emerge. This will help the group members to make any decisions that are required. When each idea has received careful attention and seems to be clearly understood by all group members, voting takes place.

There are a number of ways to vote on a decision or gain concensus on an issue. One quick and easy way is to get a show of hands. However, if there are concerns over anonymity or a long list of ideas, a rating system may be more effective.

- Ranking - For a small number of items (ten or less) group members can individually rank each item, marking down the most important item as #1, the next important as #2, and so on. Thus, if there are seven items, they would be ranked "one" through "seven". This process requires the participants not only to rate an item but to rank it in relation to the other items.

- Rating - Another method for coming to a concensus is to look at each item individually and rate it as a high priority or a low priority. Numerical values could be assigned. For example a rating of "five" is a high priority and a rating of "one" is a low priority, with various ratings in between.

Following the rating by each member, the results are then tallied. For each item or issue, the numerical values would be added up. The resulting total for each item would indicate what the group feels as a whole. The list can then be used as part of the decision-making process because it is now clear what information the focus group feels is most important.

This process uses a group of people working together and exchanging ideas and information to work on a problem. When it is used with people from the community, it provides the added benefit of increasing public awareness of the concern or issue.

Since focus group discussions can vary from those with a very set procedure to those which are quite free-wheeling, the types of answers resulting from the discussion will vary.

The answers or suggestions from a more free-wheeling focus group may be in the form of a list or a list divided into top, middle and lowest priorities. In such cases, the ideas on the list are examined further but the ideas are not summed up in any way.

Sometimes the points brought up in a focus group discussion are used to help decide some of the questions to include in a personal, telephone or mail survey. Comments made during focus group discussions may also help with the wording of survey questions.

The following flow chart summarizes the process involved in carrying out a focus group discussion.

FOCUS GROUP DISCUSSION
FLOW CHART

On the basis of information needed, the working committee decides on a discussion question and which group(s) of people will be represented in the discussion.

The working committee asks people to participate in the meeting, sets the time and place, and appoints a leader and a recorder informed about the process.

The leader explains the process at the start of the meeting. Participants are asked to individually list answers to the discussion question.

Each person in turn gives one item from the list. The process continues until all items on every person's list are recorded on a flipchart or black-board.

The group examines each idea on the recorder's list, stating opinions, asking for clarification and discuss-ing the items.

The group members vote privately on each item on the recorder's list, using an agreed-upon rating system.

The results are tallied.

The list of the group's priorities are prepared from the vote results.

Public Meetings

The most direct form of community participation occurs though public meetings. Publi.. meetings can sometimes be frustrating situations, but with thought and preparation that can be avoided. There is a tendency for special interest groups to be over-represented at public meetings and other groups, such as seniors and teens, under-represented. It is important to obtain a good cross-section of the population and efforts should be directed in this area.

The following guidelines for holding a public meeting are taken from the report Community Recreational Needs Study Manual.[6]

Prepare Background Information

- Define the purpose and objectives of the meeting
- Identify who should be invited to the meeting, both supporters and critics, and encourage their involvement
- Ensure people are aware of and understand the issues before the meeting

Choose a Location

- Select a location keeping a number of considerations in mind:
  - Proximity
  - Parking
  - Visibility
  - Suitability
- Book the facility

Inform the Public

- Undertake a publicity campaign one month before the meeting
- Use a variety of mediums
  - Newspaper - paid advertising, editorials, community service announcements
  - Television - local cable TV channel announcements
  - Radio - news releases, public service announcements, phone-in radio shows
  - Posters, fliers, newsletters
  - Telephone or door-to-door campaigns
  - Buttons, bumper stickers, T-shirts
- Contact key community groups or leaders, such as churches or PTAs
- Communicate date, time, location, reason for meeting and a contact number

Select a Chairperson

- Ensure the individual is skilled and unbiased or neutral
- The chairperson should allow everyone to speak yet limit overbearing and opinionated individuals from controlling the meeting

Develop an Agenda

- Ensure the agenda is well organized and specific
- Schedule time for speakers and be prepared to enforce it
- Arrange for a secretary or recorder
- Encourage participants by scheduling small group discussions

Arrange Equipment and Supplies

- Check equipment that is available and arrange for additional equipment
- Test equipment before the meeting
- Arrange public address system, tables, chairs, flipcharts, etc.
- Put up signs to direct the participants
- Arrange for refreshments

Follow Up

- Provide feedback to the public on the results of the meeting and the importance of their contribution
- Write a short report on the meeting, noting:
  - Why the meeting took place
  - The objectives
  - Attendance
  - Outcome
  - Actions

HOW TO...

ANALYZE THE ANSWERS

Rate of Response

The first thing that needs to be done when you have completed collecting answers to your survey is to calculate the "rate of response". The "rate of response" is the percentage of people who answered your survey.

Calculate the rate of response as follows:

$$\frac{\text{number who answered the survey}}{\text{number asked to answer the survey}} \times 100 = \text{percent or rate of response}$$

For example if 83 people answered out of 95, the rate response would be: $\frac{83}{95} \times 100 = 87\%$

On the other hand, if 83 answered out of 212, the rate of response is much lower: $\frac{83}{212} \times 100 = 39\%$

The higher the rate of response, the more reason you have to assume that the answers you collected apply to everybody you surveyed.

A low rate of response is around 20 percent.

A high rate of response is around 80 percent.

Different types of survey methods tend to yield different rates of response. For a telephone survey, a 60% rate of response is an average rate. A rate of response of 70% is considered good; less than 50% is cause for concern. A drop off/pickup survey, on the other hand, has a 40% average rate of response; less than 30% is cause for concern.

If the rate of response for your survey was low (usually a problem with mail questionnaires), try a telephone follow-up to some who did not answer to collect the opinions of more people. With a low rate of response, your committee will have to decide whether to re-survey or whether to start again. If you decide to go ahead with your results, interpret your answers cautiously and don't generalize to the entire population. You will also want to evaluate what went wrong.

Sorting

This is the point where the survey process can begin to become bogged down. On the surface it looks easy to just count up what people said. But is it just straightforward counting? And what do the numbers mean?

This section has some jargon words in it - but they have been kept to a minimum and are explained as they come up.

"Sorting" is the process where you count up how many people gave each of the possible answers to your survey questions.

There are basically three ways to sort answers. The first two methods will be discussed here:

- Hand sorting
- Hand counting from code sheets
- Computers

Computers are useful when someone is available to carry out computer analysis of the answers. Commercial programs such as Lotus 1-2-3 are suitable, but training someone to learn to use the program could slow down your project. If you select the computer method, you will need to rely on expert advice.

Hand Sorting for Closed Questions

In hand sorting, the answers to each question are totalled up one question at a time. There are two different sorting procedures. One kind is used for questions where the person can only give one answer; the second kind is used for questions where the person can give more than one answer.

Sorting When Only One Answer is Given

Let's work through an example of a question with three possible answers and each person can give only one of the answers.

EXAMPLE: Are you interested in sending your children to Northview day-camp this summer?

☐ Interested

☐ Not sure

☐ Not interested

Step 1: Separate the surveys into three piles according to the answer given:

Interested Not Sure Not Interested

Step 2: Count the number of surveys in each pile and record the totals on a clean survey that will be used as a tally of all the results. The total of all three piles should equal the total number of people who answered the survey. Double check the count of each pile if the total is incorrect. Your tally could look like this:

__47__ interested
__11__ not sure
__4__ not interested (total = 62)

Step 3: Repeat Steps 1 and 2 for each question in the survey where all possible answers are provided and each person can give only one answer to the question.

Sorting When More Than One Answer Can Be Given

Here's an example of a question with five possible answers and each person can give more than one answer to the question.

EXAMPLE: Which of the following activities would your children aged six to eight likely be interested in at day-camp? (Check all that apply.)

- ☐ Swimming
- ☐ Track and field
- ☐ Life in an early settler camp
- ☐ Building a nature exhibit for the fair
- ☐ Drawing and painting

Step 1: Separate the surveys into two piles, according to whether or not the person chose the first answer.

Swimming Not Swimming

Step 2: Count the number of surveys in each pile. The total should equal the total number of people who answered the survey. Double check the count of each pile if the total is incorrect. Enter the number who chose the first answer on the tally sheet, as below:

__17__ swimming
______ track and field
______ life in an early settler camp
______ building a nature exhibit for the fair
______ drawing and painting

Step 3: Repeat Steps 1 and 2 for each of the possible answers to the question.

Step 4: Repeat Steps 1, 2 and 3 for each question in the survey where each person can give more than one answer to the question.

<u>Hand Sorting for Open-Ended Questions</u>

Open-ended questions in a survey are more difficult to sort than closed questions.

For each open-ended question, read over all of the answers that have been given. Group the answers into piles, placing similar answers together. Then write a short phrase that most closely fits the answers in each pile.

There are usually a number of cases where only one person gives that particular answer. All these one-of-a-kind answers are usually grouped under a category labelled "Other".

EXAMPLE: What would be your main reason for enroling your elementary-aged children in summer day-camp?

After a review of all the answers, the following categories can be developed:

- Summer day-camp is fun
- Summer day-camp provides more interesting experiences for my kids than I can on my own
- I work and would leave my kids with a babysitter if there were no camp
- Other

The number of people giving an answer in each of the above categories is then counted and recorded, using the "Sorting When More Than One Answer Can Be Given".

Coding

Setting up a Code Book and Code Sheet

If you have more than 30 questionnaires, each with at least seven questions, you'll need to make summaries of the answers to each question. A code book will allow you to record all the information on one, or a few, pages.

Step 1: The first step in developing a code book is to go back to your pile of questionnaires and give each one a code number. This will be the respondent's identifying number and a substitute for his or her name. Using the number will ensure that a person's questionnaire is not recorded twice by mistake, and will allow you to check back for errors.

On the next page, the sample code sheet uses columns 1 and 2 for the respondents' identifying numbers. The two columns are necessary because, with thirty respondents, we must enter double-digit numbers. More than 99 questionnaires would require three columns for respondents' numbers (e.g., 001-099, 100, 101, etc.).

Step 2: Assign each question a column number: Question #1 (sex) in column 3, Question #2 (age) in column 4, and so on.

Step 3: Give each answer category of each question a code number. In our example, Question #1 Male is given a code of 0 and Female is given a code of 1. They could easily have been coded Male 1, Female 2. Some researchers avoid codes of 0 because the zero may mislead people into thinking there was no response.

Because each question is assigned a different column, you can use the same code numbers over again for the response categories in each question, as has been done in our example on the next pages.

Sample Questionnaire

1. What is your sex? ___ MALE _X_ FEMALE

2. Please check the category that includes your age.

   _X_ under 20 YEARS
   ___ 20 - 34 YEARS
   ___ 35 - 49 YEARS
   ___ 50 - 64 YEARS
   ___ 65 PLUS

3. Please check the category be˘ɔw that includes the furthest formal education you have completed.

   _X_ LESS THAN GRADE 9
   ___ 9 - 11 AND NO OTHER
   ___ 9 - 12
   ___ 9 - 12 AND SOME OTHER
   ___ UNIVERSITY

4. Please check off the one category that includes the total actual income in your household.

   ___ LESS THAN $3,000
   ___ $3,000 - $5,999
   ___ $6,000 - $8,999
   _X_ $9,000 - $11,999
   ___ $12,000 - $14,999
   ___ $15,000 - $17,999
   ___ $18,000 - $20,999
   ___ $21,000 AND OVER

5. How would you describe your current physical activity level?

   ___ CONSIDERABLY BELOW AVERAGE
   ___ SOMEWHAT BELOW AVERAGE
   _X_ AVERAGE
   ___ SOMEWHAT ABOVE AVERAGE
   ___ CONSIDERABLY ABOVE AVERAGE

6. Between May 1989 and May 1990, how many different sports did you engage in?

   _7_ SPORTS

7. Are you personally involved in playing softball?

   ___ YES _X_ NO

8. How much are you willing to spend per season to support softball in the community?

   _X_ LESS THAN $1.00
   ___ $1.00 - $1.49
   ___ $1.50 - $1.99
   ___ $2.00 OR MORE

Assigning Codes to Sample Questionnaire

Question	Column	Codes
	1,2	Respondent Number (0 - 31)
1	3	Sex 0 Male 1 Female
2	4	Age 1 12-19 years 2 20-34 years 3 35-49 years 4 50-64 years 5 65 +
3	5	Educational Level 1 Less than Grade 9 2 9-11 No other 3 9-12 4 9-12 Some other 5 University
4	6	Household Income (annual) 1 Less than $3,000 2 $3,000 - $5,999 3 $6,000 - $8,999 4 $9,000 - $11,999 5 $12,000 - $14,999 6 $15,000 - $17,999 7 $18,000 - $20,999 8 $21,000 and over
5	7	Activity Level 1 Considerably below average 2 Somewhat below average 3 Average 4 Somewhat above average 5 Considerably above average
6	8,9	Number of sports engaged in during previous year (00-99)
7	10	Personally interested in playing softball? 1 Yes 2 No
8	11	How much would you spend on softball fees? 1 Less than $1.00 2 Between $1.00 and $1.49 3 Between $1.50 and $1.99 4 $2.00 or more

Respondent Number One

		SEX	AGE	EDUCATION	INCOME	ACTIVITY	SPORTS	
1	2	3	4	5	6	7	8	9
0	1							

Coding Sheet

A coding sheet for the sample questionnaire is shown below. Twenty-one of the thirty respondents are listed. Just for practice, you may want to look at the sample questionnaire on page 50 and transfer the responses into the coding sheet. The identifying number is 01. The correct codes are noted below.*

1	2	3	4	5	6	7	8	9	10	11	
0	1										
0	2	1	1	1	3	3	0	0	2	3	
0	3	0	2	3	4	4	0	6	1	2	
0	4	1	3	3	5	4	0	4	1	3	
0	5	1	4	4	3	5	0	9	2	2	
0	6	1	3	3	5	5	0	2	2	1	
0	7	0	3	3	5	5	0	7	1	4	
0	8	0	2	2	4	2	0	5	1	3	
0	9	0	2	2	3	3	1	1	1	2	
1	0	0	2	2	3	4	1	2	1	3	
1	1	0	1	1	2	2	1	1	1	4	
1	2	1	2	2	3	4	0	5	1	3	
1	3	1	2	2	4	3	0	6	1	3	
1	4	0	5	4	7	5	0	6	2	3	
1	5	1	1	1	1	3	0	0	2	4	
1	6	0	2	1	3	1	1	2	1	2	
1	7	1	3	3	5	4	0	3	2	4	
1	8	1	4	4	7	5	1	0	2	3	
1	9	1	2	2	4	3	0	7	1	3	
2	0	1	2	2	4	2	0	2	1	2	
2	1		3	3	5	4	0	8	1	4	

* The sample questionnaire codes starting at column 3 should be: 1. 1. 1. 1. 4. 3. 0. 7. 2. 1.

Cross-sorting

Cross-sorting allows you to compare the way people answer one question to the way they answer another question.

Background questions are usually cross-sorted with one or more survey questions to help explain answers to questions in the survey.

Cross-Sorting When Only One Answer Is Given to the Second Question

EXAMPLE: Compare answers to background Question #17:

Do you live
______ in town
______ on the town outskirts
______ within 10 km of town
______ further than 10 km from town

with answers to Question #13:

Do you have space for a summer camp activity on your property?
______ No
______ Yes
If yes, list: ______________________________

____

____
(activity)

Step 1: Separate surveys according to answers on Question 17 into four piles.

In Town	Outskirts	Within 5 km	Further than 5 km
total = 14	total = 12	total = 15	total = 10

Step 2: Separate each pile from question 17 into two piles according to the answer to Question 13.

Space	No Space	Space	No Space	Space	No Space	Space	No Space
total = 1	total = 13	total = 2	total = 10	total = 9	total = 6	total = 8	total = 2

Step 3: Record the numbers from each of the piles in a table.

A Comparison of Where People Live
and
Available Space for Camp Activities

Space for Camp Activity	Residence			
	In Town	Outskirts	Within 10 km	Further than 10 km
YES	1	2	9	8
NO	13	10	6	2

From this table you can see that people living further from town have more space for camp activities, which is what you would probably expect. But you also found three places in town or on the outskirts with space that you did not expect.

The fill-in answers for the kinds of activity that people have space for can now be recorded from each pile. Make a handwritten list, keeping clear the place of residence with the types of activity offered.

Space for Activities

In Town	Outskirts	Within 10 km	Further than 10 km
swimming pool	picnics	picnics	picnics
	volleyball	campfire	fishing
	badminton	hiking in woods	hiking in woods
		field sports	field sports

Cross-Sorting When More Than One Answer Can Be Given to the Second Question

EXAMPLE: Compare answers to background Question 17:

Do you live
______ in town
______ on town outskirts
______ within 10 km of town
______ further than 10 km from town

with answers to Question 8:

Which sites would you be willing to drive your children to for day-camp?

Cook's Corners? ____ Yes ____ No
The ball park? ____ Yes ____ No
First Church? ____ Yes ____ No

Step 1: Separate the surveys according to answers on Question 17 into four piles.

Step 2: For each of those piles count the number given each of the answers to Question 8 using the method explained on page 53. Since people can give any or all answers to Question 8, each choice is counted separately. The diagram shows the total of "Yes" answers after cross-sorting has been completed.

In Town total=14			Outskirts total=12			Within 10 km total=15			Further than 10km total=10		
CC	BP	FC	CC	BP	FC	CC	BP	FC	CC	BP	FC
9	14	14	10	11	12	15	11	11	10	7	6

Key: CC - Cook's Corners
BP - Ball Park
FC - First Church

Step 3: Record the number of "Yes" answers for each of the combinations in a table.

A Comparison of Where People Live
and
The Camp Location
They Are Willing to Drive To

Camp Locations	Residence				
	In Town	Outskirts	Within 10 km	Further than 10 km	Total
Cook's Corners	9	10	15	10	44
Ball Park	14	11	11	7	43
First Church	14	12	11	6	43

This table shows how background information can explain people's answers. Looking at the Camp Location totals, the three choices are almost equal (44, 43, 43).

But looking at the circled numbers and see the most popular choices of people according to their place of residence.

These differences could be taken into account in reaching a final decision on a campsite.

Comparing Answers from Different Groups to the Same Question

One of the reasons for surveying more than one group is to collect different points of view on the same issue. If you have asked the same question of more than one group, you can bring those answer totals together in one table to compare them as in the following example.

Opinions on Whether the Swimming Pool
Should be Open in June

Survey Group	Yes	No	No Opinion	Total
Season's Pass Holders	149	7	0	156
Local Taxpayers	130	193	47	370

From the above table you can see a large majority (149 out of 156 or 95.5%) of season's pass holders want the pool open in June compared to about one-third (130 out of 370 or 35.1%) of taxpayers.

A P P E N D I C E S

Appendix A

Resource Agencies

Alberta Bureau of Statistics

7th Floor, 9811 - 109th St.
Edmonton, Alberta
T5K 0C8 — 427-3058

Alberta Career Development and Employment
Regional Offices

CityCentre, 10155 - 102th St.
Edmonton, Alberta
T5J 4L5 — 422-0046

Bag 900-41
9621 - 96th Ave.
Peace River, Alberta
T8S 1T4 — 624-6531

Alberta Culture and Multiculturalism
Regional Cultural Consultants

#2501 Provincial Building
10320 - 99th St.
Grande Prairie, Alberta
T8V 6J4 — 538-5408

#316 Provincial Building
5025 - 49th Ave.
St. Paul, Alberta
T0A 3A0 — 645-6328

Alberta Economic Development and Trade
Regional Business Development Branch
Regional Offices

Box 2490
111 - 54th St.
Edson, Alberta
T0E 3A0 — 738-8229

Bag 900-3
10122 - 100th St.
Peace River, Alberta
T8S 1T4 — 624-6113

Alberta Economic Development and Trade (cont.)

#1401 Provincial Building
10320 - 99th St.
Grande Prairie, Alberta
T8V 6J4 538-5230

Box 1688
5025 - 49th Ave.
St. Paul, Alberta
TOA 3A0 645-6358

Alberta Municipal Affairs
Regional Office

Bag 900-30
9621 - 96th Ave.
Peace River, Alberta
T8S 1T4 624-6189

Planning Services Division
12th Flr., CityCentre
10155 - 102 St.
Edmonton, Alberta
T5J 4L4 427-2225

Northern Alberta Development Council

Bag 900-14
#206, 9621 - 96th Ave.
Peace River, Alberta
T8S 1T4 624-6274

Alberta Recreation and Parks
Regional Offices

Box 747
4926 - 1st Ave.
Edson, Alberta
TOE 0P0 723-8227

Box 1454
5025 - 49th Ave.
St. Paul, Alberta
TOA 3A0 645-6353

Alberta Recreation and Parks (cont.)

Box 1078 4917 - 53rd Ave. High Prairie, Alberta TOG 1EO	523-4561
#1701 Provincial Building 10320 - 99th St. Grande Prairie, Alberta T8V 6J4	538-5300
Bag 900-11 3rd Floor, 9621 - 96th Ave. Peace River, Alberta T8S 1T4	624-6295

Regional Planning Commissions

MacKenzie Regional Planning Commission Box 450 Berwyn, Alberta TOE 0EO	338-3862
South Peace Regional Planning Commission 200 Windsor Court 9835 - 101st Ave. Grande Prairie, Alberta T8V 0X6	532-0988
Yellowhead Regional Planning Commission Box 245 Onoway, Alberta TOE 1VO	967-2249

Statistics Canada

#215, 11010 - 101st St. Edmonton, Alberta T5H 4C5	1-800-282-3907

APPENDIX B

Helpful Hints for Volunteer Survey Takers*

1. Relax. Remember that this is a community survey developed by community members for community purposes.

2. Identify yourself. State your first name and show your identification.

3. Invite people to participate. They are your fellow residents and their participation is important but voluntary.

4. Provide only the information you are sure of. You don't have to answer all questions; direct people to other sources of information.

5. Encourage ideas. You do not need to defend or criticize anyone or any service.

6. Help people to express themselves. The goal is to get their ideas out - not promote yours.

7. Try to be aware of hesitations or uncertainties. Listen for what people may be trying to express. Check if they have had any problems with the form.

8. Be friendly and sociable. This does not mean you need to spend a great deal of time with each person, nor that you need to go into the home. Use your best judgement.

9. Don't gossip. It is not appropriate to talk about the other homes you have been in or tell what other people have said.

10. Help fill out survey forms if asked. Some people may find it difficult to do the survey and will ask for help.

11. If you feel uncomfortable, have someone accompany you.

12. Let someone know exactly where you are going when you deliver and pick up the forms.

13. Let people know that you have nothing to sell. Many groups use surveys as a lead-in for their real purpose.

14. Be quietly enthusiastic about the survey. It is for your community.

15. Quietly and politely take your leave if someone becomes abusive or does not wish to take part.

16. Review each survey form after you receive it to see that it is complete. Your interest is not in the answers but in completeness.

17. Make no personal commitments regarding results. Refer people to the newspaper or the town office.

18. If you have any questions or problems, call your co-ordinator or the town office.

19. Make one callback if people are not at home. Do not go back often.

20. Make notes of your observations. You will hear and see things that will help us understand the responses.

* As taken from the Beaverlodge Community Survey; Fresh Start Consultants Ltd., June, 1985.

APPENDIX C

Terms and Definitions

The following is a select list of terms as defined in the Survey Research Manual produced by Alberta Recreation and Parks. See the bibliography for more detail.

Bias:

A biased question is one that influences people to respond in a way that does not accurately reflect their position on the issues. Some people are aware of the bias and may be affected negatively by it, so they may not answer the question truthfully. Other people may be unaware of the bias and may then be influenced to respond in the direction encouraged by the wording of the question or the gestures of the interviewer.

Closed-Ended Questions:

A closed-ended question presents a problem or issue and provides alternative answers from which the respondent can choose the answer that best reflects the respondent's situation. The answer that the respondent can choose from should be mutually exclusive and exhaustive.

Closed-ended questions are quite easy to code. There are many types of closed-ended questions.

1. Multiple Choice: Several choices of answers are listed. The respondents record their answers by placing a check mark or number in the appropriate blank, or by circling the correct words.

2. Checklists: Checklists are used when more than one answer may be correct. Checklists indicate the presence or absence of something.

3. Ranking: The respondents must arrange all the given answers in order according to some specified level.

Codebook:

A codebook is a document that describes the location of items from the questionnaire in the survey data file and the specific labels that make up those items. A codebook acts as a guide for coders as they prepare questionnaire responses for coding and for locating items in data files during the analysis.

Coding:

Coding is used to assign numbers to identify responses and response categories to make the task of tabulation easier. Coding may be done manually on paper for hand tabulation or prepared for computer analysis by keypunching the codes onto cards or typing the codes into a computer terminal to transfer onto a magnetic tape.

Confidence Level:

The practitioners can express the accuracy of the sample statistics in terms of their level of confidence that the statistics will fall within a specified interval. For example, '95% confidence' is often used.

Confidentiality and Anonymity:

An anonymous study is one in which nobody (not even the practitioner) can connect returned questionnaires to the names of those completing them. A study is confidential when the practitioner knows who has responded to each questionnaire and yet promises not to reveal this information to other people.

Cover Letter:

Cover letters should be short and to the point and accompany any survey sent through the mail or hand-delivered. The cover letter should include: the purpose, objectives and rationale of the study; a description of how the persons were selected, a statement of the level of confidentiality and/or anonymity; an introduction of the researcher; identification of the sponsoring organization; deadline date; instructions for returning the questionnaire if necessary; and a "thank you' to the respondent.

Cross-tabulation:

Cross-tabulations are used to examine the number of cases that occur jointly in two or more categories by integrating the response of two or more questions. Cross-tabulations explain rather than describe data.

Exhaustive:

The practitioner should try to include all possible answers to a question. If a practitioner feels he has left out some possible answers, he should include a 'don't know' or 'other , please specify' category, so that every respondent can answer.

Filtering Questions:

Filtering questions are those which direct some but not all respondents to skip one or more questions on the answer they provide. Special instructions are required for filtering questions.

Follow-up Letters:

Follow-up postcards or letters constitute one of the best methods for increasing the response rate. Generally two follow-up letters follow the questionnaire in two or three weeks. The first follow-up is a letter that encourages those people who have not responded to do so and thank those who have responded. The second follow-up should also include another questionnaire. Both follow-up letters should include basically the same material as the cover letter.

Leading Questions:

Leading questions are those that are worded in a way that strongly influences the respondents to give a certain answer. They lead the respondents to a particular reply. Leading questions do not elicit accurate answers.

Literature Review:

A review of the literature on the specific research topic should be completed to determine what information is available and what information is not available. A literature review can aid the practitioner on previous methods of data collection and areas that have or have not been researched. Sources of information are libraries, agencies and statistics.

Loaded Words:

Loaded words are those which spark immediate positive or negative feelings in the respondents. The danger is that the respondents will react more to the words than to the question.

Mutually Exclusive:

The categories in a question should be clear and not overlap. In some cases, questions are worded in a way that requires respondents to give more than one answer when only one is required.

Open-end Questions:

Open-ended questions allow the respondents to answer with their own words. Open-ended questions are best used in the exploratory or design stages or when studying complex issues such as attitudes and opinions. Open-ended questions do, however, present problems when it is time to code.

Pre-tests:

In pre-testing, the practitioner sends the questionnaire to a sample of people as similar as possible to the people who will be receiving the actually questionnaire. The practitioner also sends copies to other people, such as experts in the research field.

Random Sampling:

A random sample is defined as a sample which has been selected from the population by a process which assures that each possible sample of a given size has an equal chance of being selected, and that all the members of the population have an equal chance of being selected into the sample.

Respondents:

Respondents are those who volunteer their time to cooperate with the practitioner by providing information about themselves or knowledge about certain issues. The practitioner's search for information should never harm the respondents in any way.

Response Rate:

To have the most representative survey, the response rate should be 100%. However, the response rate is often much lower. When the questionnaire is dropped off and picked up, if the response rate is between 30 and 40%, it is considered to be good. Unless a high response rate is obtained, the study results cannot be assumed to be representative.

Sample:

A sample is a subset of the population. In an experiment, for economical reasons, the practitioner usually collects data on a smaller group of subjects than the entire population. The smaller group is called the sample.

Surveys:

Surveys are useful for examining things that are not observable, such as opinions and attitudes, as well as for obtaining descriptive information about the respondents. There are four types of surveys that practitioners can use in their studies.

1. Face-to-Face Interview: A face-to-face interview involves a meeting between a respondent and interviewer who records answers to the survey questions.
2. Telephone Interview: In a telephone interview, the respondent is reached by telephone and the interviewer records the answers to the questions.
3. Self-Administered Questionnaires: In a self-administered questionnaire, the respondent is responsible for understanding the instructions and questions and recording his answers.
4. Public Meeting:Public meetings are open to all those affected by the issue under study. It is an opportunity to both give and receive information, to discuss issues and to reach an agreement. This is an informal method of gathering information and can only be analyzed by recording and examining the content of the discussions.

Tables:

Tables cross-classify two variables into rows and columns. A reader should be able to understand a table without referring to the text. Tables must have complete titles and headings to aid the reader in understanding what the tables mean.

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Endnotes

1. Abbey-Livingston, Diane, and Abbey, David S. **Enjoying Research - A "How-To" Manual on Needs Assessment** (Recreation Branch, Ontario Ministry of Tourism and Recreation, Toronto 1982), pp. 65 - 75.

2. Ibid., pp. 101 - 103.

3. Ibid., pp. 168 - 170.

4. **Needs Assessment Handbook: A Close-up Look** (Alberta Culture Library Services Branch, September 1985), pp. 11 - 15.

5. Ibid., pp. 12.

6. **Community Recreation Needs Study Manual** (City of Edmonton Parks and Recreation, January 1980, pp. 18 - 20.

7. Abbey-Livingston and Abbey, pp. 156 - 160 and 193 - 201.