

## **Video Four: Fieldwork and Response Management**

### **Page 1: Welcome**

Hi everyone, welcome to Video 4 in the CSS Toolkit.

Funded by Community Sector Banking - 2019 Social Investment Grants Program and in partnership with the NSW Council of Social Service, Survey Matters have produced this video series educational to guide NGOs when conducting Customer Satisfaction Surveys.

### **Page 2 -Customer Satisfaction Survey Video Series**

Here is this picture again, providing an outline of the video series. Hopefully you have seen the first couple of videos and they have helped you design your customer satisfaction survey.

This video will discuss Fieldwork and Response Management and will provide practical advice on things such managing your sample and maximising response rates to ensure you have good representation of your target audience.

### **Page 3: Fieldwork and Response Management**

Fieldwork, or data collection, is generally the third step in the research process.

There are two main elements to this part of the research process – planning sample to work out how many responses you need and maximising your response rate to ensure you collect data that is representative of your target audience.

### **Page 4 & 5: Plan Your Sample**

So once you have designed your survey it is important that you think about your sample. You will have already determined who your target audience is at an overall level, however, you will need to think about it in a bit more detail. There are two main steps here.

- Firstly, you need to work out how many responses you need to ensure a reliable sample.
- Secondly, you need to understand the composition of the sample you need, to accurately represent your target audience.

## **Page 6: Determine How Many Survey Responses you Need**

The first step is to work out how many responses you need.

- When you are working out your sample, there are a couple of terms it helps to understand. Population refers to all of the members of a defined group, for example the Australian population or your complete customer or volunteer group. A sample is a representative subset of the population.
- Sample size is important because the number of responses you have provides an indication of the reliability of the data you have collected. If the sample size is too small, you don't get an accurate picture of the group you are trying to understand.
- However, that doesn't necessarily mean bigger is always better. If your sample size is too large your study becomes expensive, time consuming and complex. Even though the results may be more accurate, the costs outweigh the benefits.
- So how do you work out the number of responses you need? This can be worked out statistically, using a [sample size calculator](#) like this one from the ABS. There is a link to this site in the transcript of this video, which you should have access to, however, on the slide we have created a [guide](#) to determine the minimal sample size required for a reliable survey.
- It is important to recognise that reliability is based on the **number** of responses you have, not on your response rate. So if you are working with a small population, like a group of 100 service users of a small NGO or NFP, you would need a sample of 75 to have a reasonable level of confidence in the results. . If you have a larger group, like a register of 1000 volunteers for a larger NGO or NFP, you might aim for a sample of 280.
- If you are analysing sub groups, such as age groups, be sure that you have a sample size sufficient to ensure the confidentiality of the participants.

## **Page 7: Ensure you have a Representative Sample**

Once you start collecting your data, it will be important to ensure that the responses you receive provide a representative sample of your population.

- So what does this mean? In a representative sample, the people who you have collected data from should accurately reflect the group as a whole. For example, if a third of your population is under 30, you should ensure that a third of your responses come from respondents who are under 30.
- To ensure you collect responses from a representative sample of your population, you should monitor responses as they are collected and check the distribution of those responses. For example, if you have not collected enough responses from those aged under 30 years old, you may want to target your next reminder to this specific audience.

### **Page 8: Maximising Response Rates**

Once you have worked out the sample size you are working towards, you can maximise your chances of engaging your respondents by sticking to some of the following practices.

### **Page 9: Maximise Response Rates**

There are several things to consider:

- Your relationship with the audience
- Timing and frequency of your survey communications
- Survey length
- Survey usability
- Customisation your survey to your audience
- Whether to offer incentives

### **Page 10: Consider Your Relationship with Respondents**

The strength of the connection you have with your respondents has a major impact on response rates and participant motivations to complete the survey.

- If you have no personal interaction with the target audience you would expect a lower response rate than those who have a strong relationship with their audience.
- As an indication, [data collected by Focus Vision Decipher](#) (software survey provider) indicates that while an unbranded survey invitation is likely to only achieve a 1% response rate, this can increase to 50% when a survey is targeted to an audience with whom you have a strong relationship.
- As a result of this, your survey response rate expectations must be realistic. There is no point in trying to hit an unachievable target of 80% if you have a large database of potential respondents who are not well known to you.
- Also keep in mind that a response rate of 50% or more is considered high. A 5%-30% response rate is more typical.

### **Page 11: Plan your Communications**

The timing and frequency of your survey communications also has a big impact on response rates. It is really important that you consider how often you are sending out surveys. Over surveying your participants can lead to participant fatigue and a lack of variation in survey responses

- We would suggest that you pre-plan when you send out your survey invitation and how often you send out reminders to complete your survey.
- We also recommend that you send reminders only if necessary and limit to a maximum of 4 rounds.
- The timing of your reminders is also key. If you send reminders too often, you risk irritating or alienating your target audience. If you don't send reminders often enough you risk losing your target audience entirely. As a guide, [data from Survey Monkey recommends](#) sending a reminder 48 hours after the initial invite for short surveys and 72 hours after for longer surveys and busier audiences.
- Most survey software allows you to automate your reminders so you can set your timing strategy in advance.

### **Page 12: An Example of a Survey Communications Plan**

It is always a good idea to create a survey communications plan. This slide provides an example of what a plan might look like. What we recommend is that you:

- Start with pre-survey communications
- Then distribute your invitation with the survey link
- Have a schedule of reminders on set dates planned and ready to go

So, let's walk through this in more detail.

### **Page 13: How to Write a Pre-Survey Communications Email**

Before you launch your survey, it is a good idea to send out an email or letter, or post to social media advising your target audience that the survey is going to be held.

- The purpose of this communication is to inform your audience about the type of survey you are conducting and why you are conducting it. It is important that you include details of your organisation and assure potential participants that their responses will be confidential. Make sure you provide a date on which the survey can be expected.
- It is good practice for this communication to come from someone senior within your organisation, or someone with whom the audience are likely to be familiar.
- We would usually send this pre-survey communication email or letter out in the week prior to the survey being distributed. Depending on the nature of the survey, and your target audience, it can also be a good idea to promote the survey on social media too.

## Page 14: How to Write a Survey Invitation Email

The next step in the survey process is to distribute it to your intended audience. Depending on the survey method you are using, this can be by email, social media, letter, telephone or in person. Whatever method you use, it is important to still provide your audience with the same information.

- To increase engagement we suggest that you identify your organisation and provide visible branding so that the survey can be identified as a trusted request for information. You should also reiterate why you are conducting the survey and assure potential participants that their responses will be confidential.
- It is also good practice to provide the survey end date. This also serves to provide a sense of urgency for completion, so don't make it too far in the future. Two – three weeks is a reasonable time to provide for survey completion.
- If you are offering a prize, the email should provide full details of the prize being offered, the value of the prize and what respondents have to do to have a chance to win the prize.
- Pay attention to your survey subject line and try to create something that will entice your audience to complete the survey. Also, make sure the sender's email address is recognisable to potential respondents.
- Finally, it is a good idea to keep the email short and place the survey link close to the top – it should be quick and easy for respondents to see the survey link.
- Remember, if you are sending out an anonymous survey to a wider population, you can also post a link to the survey on social media to increase reach and engagement. However, you just need to make sure you include all the survey information within your survey introduction.

### How to write a survey invitation email

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**From:** [Insert NGO name]  
**To:** <Recipient Name>  
**Re:** We want your feedback. [Insert NGO name] 2020 Service User Survey

Dear <Name>

Welcome to the **[Insert NGO name] 2020 Service User Survey**.

The survey is being conducted to gain your feedback on the activities undertaken by [Insert NGO name]. The results of the survey will help the [Insert NGO name] understand what is important to you as service users and how [Insert NGO name] can serve you better in the future.

**Complete the Survey Here [URL link]**

The feedback you provide [Insert NGO name] will remain **confidential** and **will not** impact the services you receive in any way. Results will be reported on an aggregate level only, so your individual response will not be able to be identified.

To encourage participation [Insert NGO name] is offering the chance to **WIN a voucher for \$100 AUD**. To qualify you must complete the survey before it closes on at **5pm on (insert date)**. Depending on your responses, it should take around 10 minutes to complete.

If you have any questions in relation to the survey, please contact [Insert NGO representative contact name] via [Insert email address] or on [Insert phone number]

Thank you for your participation, your views are important and we welcome your feedback.

**[Insert NGO name]**

**Important things to include:**

- NGO name and branding
- Purpose of survey
- Survey link
- Maintenance of confidentiality
- Incentive offered (if any)
- End date of survey
- Sign off from NGO

**Tips**

- Pay attention to your email subject line and your senders email address
- Place the survey link as close to the top of the email as possible

### **Page 15: How to Write a Survey Reminder Email**

Once your survey has been distributed, it will most likely be necessary to send out reminders to encourage respondents to complete the survey.

- Depending on the survey method you are using, and the audience you are trying to reach, reminders can be by email, social media, letter, telephone or in person.
- It is also suggested that reminders be kept short and that they are only sent to those who have not participated. **It is not good practice to send reminders to people who have already taken part.**
- Reminders can also be targeted to specific groups. This is particularly important to ensure you have a representative sample, for example if you don't have enough young people or enough people from a particular location or who use a particular service in your sample, then you could target your next reminder to this group to increase their representation in the sample.
- To create a sense of urgency, include a reminder of the survey end date. We often use phrases like "closing soon" or "last chance to participate" in our reminder communications.
- Again, incentives can be really important to maximising response rates so make sure your reminders continue to mention any prize you are offering.

### **Page 16: Consider your Survey Length**

So that covers everything you need to think about in relation to communications. Survey length also has an impact on response rates. Your target audience will help inform decisions on your survey length and content granularity.

We talked about this in video three, however, survey length is really important so it is worth going through this quickly again.

- The more questions you ask the less time your respondents spend on average answering each question. If surveys are too long it can potentially irritate respondents and increase survey drop-out rates.
- As shown below, participants take more time per question when responding to shorter surveys. For example, if there are between 3-10 questions respondents will spend an average of 30 seconds on each question. This drops to under 20 seconds once the number of questions increases to over 25.
- Just because participants spend less time on longer surveys, however, it does not necessarily mean that the answers collected are less thorough. The accuracy of answers depends on a range of factors including the type of survey, the target audience and the strength of the relationship between the respondent and your organisation.
- However, length does pose a barrier to participation in future surveys so do keep it in mind.

### The impact of survey length on completion time

Question count	Question average (secs)	Total survey completion times
1	75	1 min 15 sec
2	40	2 min
3-10	30	2-5 min
11-15	25	5-7 min
16-25	21	7-9 min
26-30	19	9-10 min

#### **Page 17: Improve your Survey Usability**

It is important that you consider your respondents’ experience when taking the survey. Response rates are higher if respondents find the survey enjoyable to answer, so take the time to create an attractive user-friendly survey. There are a few things to consider here.

- Surveys that are clear and easy to understand are easier for respondents to complete. Write clear questions to avoid respondent confusion and potential fatigue.
- Use a variety of question types to keep respondents interested – avoid too many matrix questions, or tables which include lots of statements to be rated.
- If you are conducting an online survey, you should also make it easy for mobile users to take part and ensure you optimise your survey for mobile devices. This is usually an easy option to implement in most software.

#### **Page 18: Customise to your Audience**

Surveys that are customised to the needs and preferences of their users will also obtain higher response rates. There are several things you should consider here.

- The first step is to ensure you can reach the target audience you are trying to obtain responses from. This means you should make sure you deliver your survey in a format that is suited to your target audience. For example, there is no point in creating an online survey for participants who do not have access to the internet.
- It is also important to ensure participants have an interest in the survey topic. Your target audience is more likely to respond to the survey if they are interested in the outcome - for example, service users would be interested in planned changes to service delivery.
- Where you can, it is good practice to personalise survey invitations and reminders to respondents and share with them the nature of the research being conducted.

### **Page 19: Provide Incentives**

Offering an incentive to your respondents is another effective way to boost response rates to your survey.

- An incentive is giving participants something in exchange for completing a survey, for example financial compensation or material goods or service.
- The first type of incentive is monetary. This could include gift cards, cash payments, or specific products. They should really to targeted to your audience and what would appeal to them.
- The higher the value of the monetary incentive the higher the response rate, however there is a point where increasing incentive value does not improve response rates. There is no ideal value for an incentive, but you should keep in mind:
  - a. The budget of your project
  - b. Your target audience
  - c. How you will provide the incentive
- The second type of incentive is non-monetary. It is important that non-monetary incentives have universal appeal to your target audience. For example, you may offer free supplies or discounts on services or free training session or free entry to an event you are running.

### **Page 20 – Conclusion, and Next Videos**

So that concludes our video on good survey fieldwork and response management practices. Hopefully that gives you some ideas to consider as you collect responses for your next survey.

As I said, there are six videos that provide more information about survey design, questionnaire design and programming, analysis and reporting, privacy and ethics. The next video in the series goes into detail about analysis and reporting.

### **Page 21 – Questions. Get in Touch**

If you have any questions, we are also available by phone or email. So feel free to reach out to us at any time.

Thanks for watching!