Training Workshop for Charity Organizations: Planning a Community Survey

14th of May 2021

Prepared and organized by Dr. Neli Demireva

The workshop was aimed at NGOs and other voluntary organizations. Its main objective was to introduce good practices in terms of survey design and discuss a variety of different survey questions aimed at capturing community cohesion and community well-being as well as a variety of community characteristics. This guide provide examples and frequent checklists remind workshop participants of the essential elements of survey design.

Training Workshop for Charity Organizations: Planning a Community Survey

Dr. Neli Demireva
Department of Sociology/MISOC
University of Essex

The workshop was delivered by Dr.Neli Demireva

About me

My name is Neli Demireva, I am a Senior Lecturer in Sociology in the Department of Sociology. I did my PhD at the University of Oxford on ethnic penalties in job search and the quality of jobs and have since continued to work in the areas of ethic diversity, inequalities, cohesion and social vulnerability. From 2015 to 2019, I coordinated the GEMM project (Growth, Equal Opportunities Migration and Markets). More information about the project can be found here: https://gemm2020.eu/ and about my research: https://nelidemireva.com/

Survey Experience: apart from working with surveys such as the Citizenship Survey, The Labour Force Survey, Understanding Society, I was part of the designing team of the Managing Cultural Diversity Survey 2010. Most recently, designed a survey for CoFarm – a co-farming charity organization in Cambridgeshire.

The workshop covered several important themes:

- How to ask to right questions;

- Think about questionnaire banks;

- Technical issues to be considered;

- How to evaluate survey questions;

- Pitfalls to avoid;

- How to structure a questionnaire;

- Many tips and anecdotes!

- Useful checklists.

We started by discussing what a survey is. **A survey** is a system for information collection from or about people to describe, compare, or explain their knowledge, attitudes, and behavior. Surveys are taken to gather information about people's attitudes and choices, to find out about people's behaviours. Individuals, communities, schools, businesses, and researchers use surveys to find out about people by asking questions about their feelings, motivations, plans, beliefs, and overall social backgrounds. Survey questions are typically arranged into mailed or self-administered questionnaires. Because questions are the focus of many surveys, it is essential that you have a good knowledge on how to ask them, in both written and spoken form.
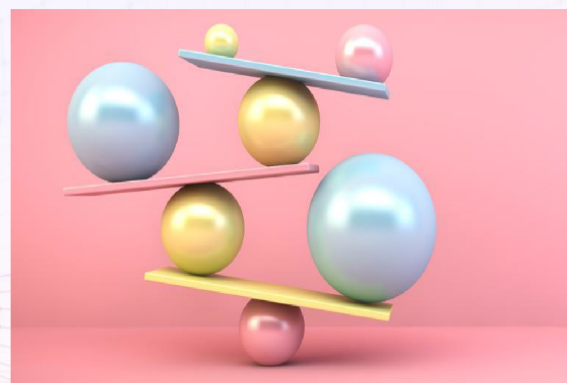
The ways in which survey questions are asked can prescribe the answers; therefore we shall come back to this later. The question order is never random.

Designing a Survey means that you have considered what to ask but also the order of questions!

May appear random...
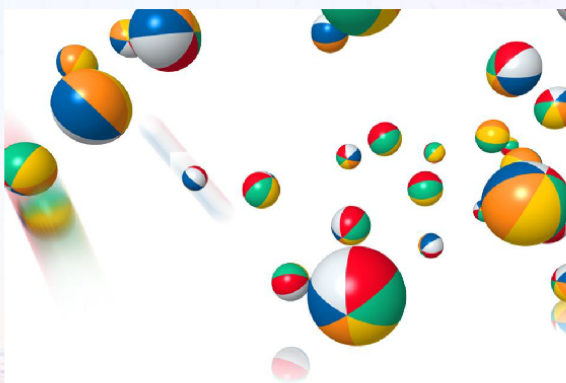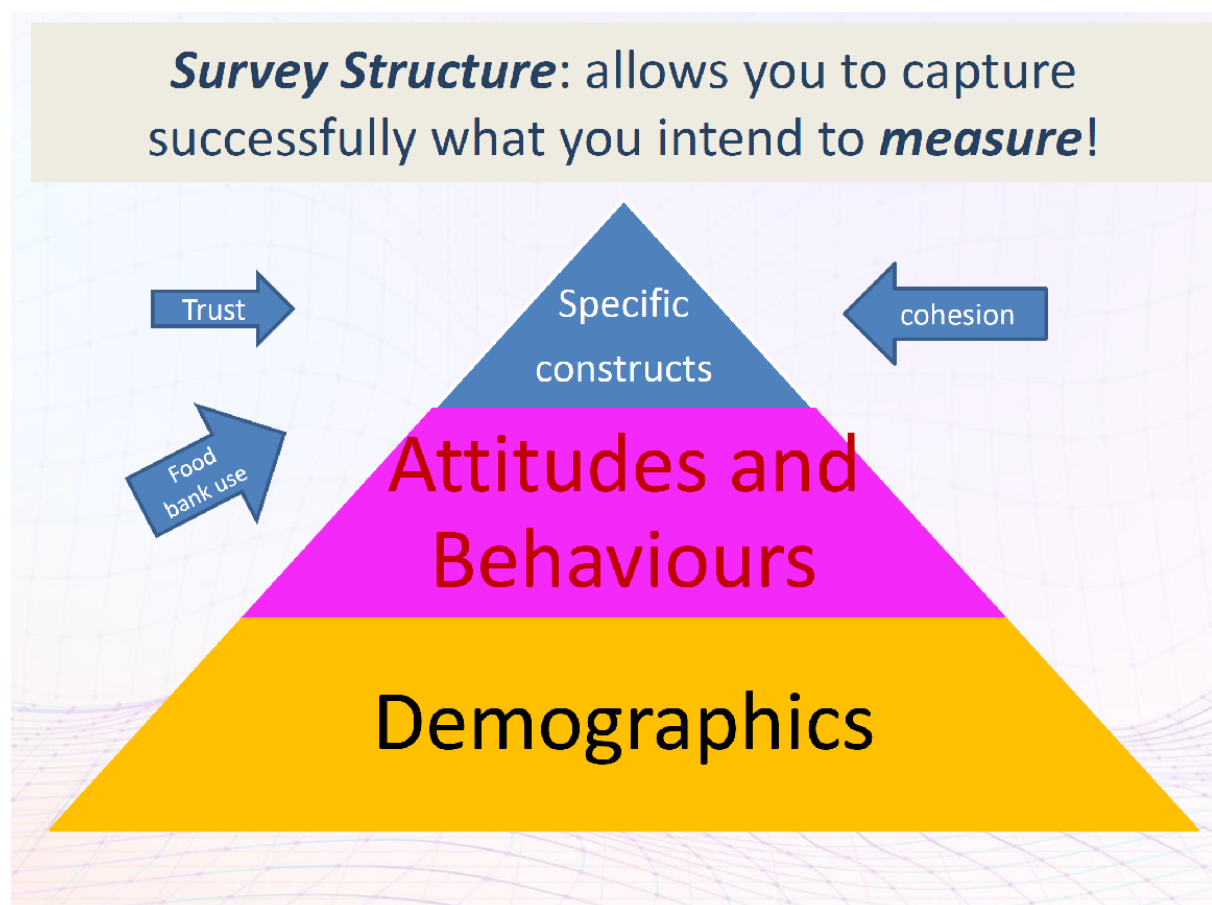
But, careful construction!

The origins of survey research lie with the idea of social reformers and their desire for fact-finding. The first we should mention is Charles Booth. Charles James Booth was a British shipowner, social

researcher, and reformer, best known for his innovative philanthropic studies on working-class life in London towards the end of the 19th century. During the 1860s Booth started to become interested in the philosophy of Auguste Comte, the founder of modern sociology. Booth was concerned by contemporary social problems, and not religious at all, but he recognised the limitations of philanthropy and conditional charity in addressing the poverty which scarred British society. He completed the study 'The Life and Labour of the People of London' in 1892. In the course of the study complex maps were designed which relied on observation – there was little direct interviewing – the subjects many of whom lived in abject poverty were still considered 'untrustworthy' (O'Day and Englander, 1992)!
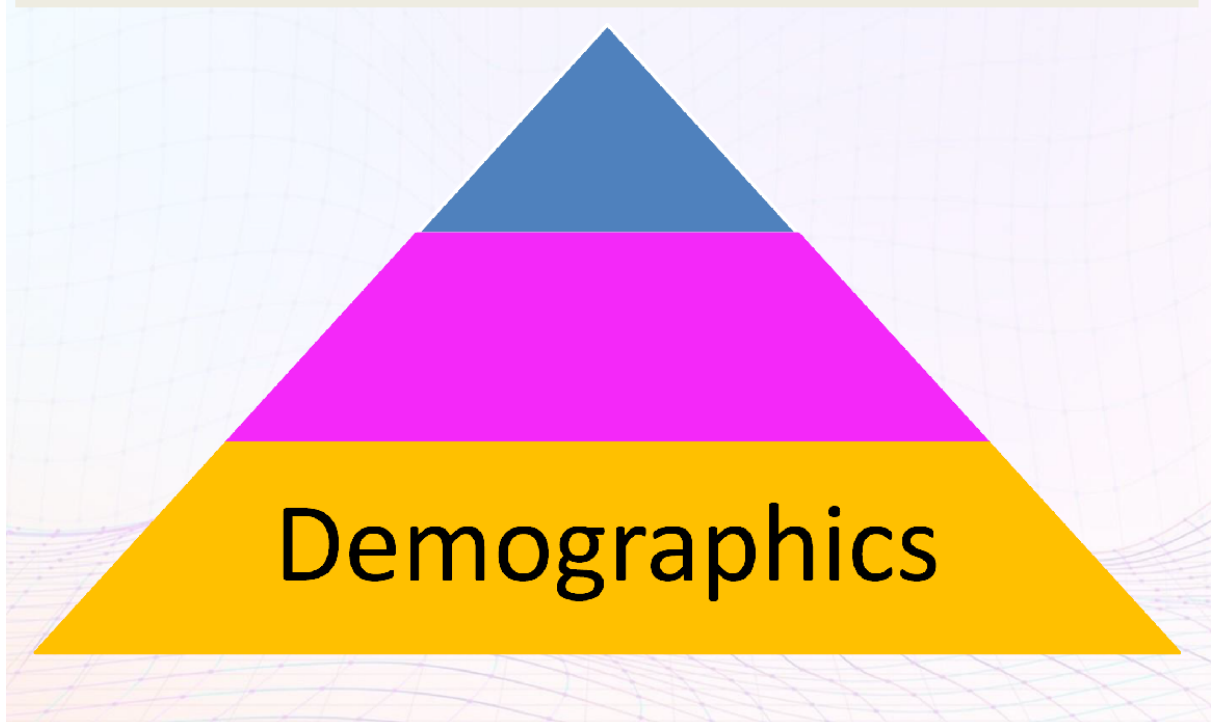
O'Day, Rosemary, and Dand Englander. *Mr. Charles Booth's Inquiry: life and labour of the people in London reconsidered.* A&C Black, 1992.

Survey structure is important – many surveys start with Demographics and proceed with attitudes and behaviours and other social constructs:

Survey Structure: allows you to capture successfully what you intend to **measure**!

Trust → Specific constructs ← cohesion

Food bank use → Attitudes and Behaviours

Demographics

Let's take a closer look at the survey pyramid!

Demographics

Demographic information allows you to better understand certain the background characteristics of your respondents, in particular to gather information about their age, race, ethnicity, income, work situation, marital status, etc.

Here is an example of some demographic and socio-demographic factors:

What do we mean by **demographics** (often extended to socio-demographics)?

- Age, sex, gender, marital status, ethnicity, children, presence of dependent children in household, type of accommodation (No of rooms), whether labour market active, education, occupation (perhaps consider social class), any benefits, disability or long term illness; social vulnerability: income, in danger of losing one's job, previous spells of unemployment.

Checklist No1

Examples:

Let's think about **labour market activity**, for example?

- Can you think of a suitable survey question that will capture **labour market activity**?

Next, we would like to ask a few questions about work. We'd like to know if you are working now, temporarily laid off, or if you are unemployed, retired, permanently disabled, a homemaker, a student, or what? (Please select all that apply):

- Full time Employee
- Part time employee
- Self employed freelance
- Self employed with employees
- Temporarily laid off
- Unemployed
- Never worked
- Retired
- Homemaker
- Long term disability/illness
- Student

What about social class?

- How would you ask about somebody's **profession/ occupation**?

Modern professional occupations (*teacher, nurse*)

Clerical and intermediate occupations

Senior managers

Technical and craft occupations: mechanic

Semi routine manual

Routine manual

Middle or Junior managers

Traditional professional occupations

What do we know about certain questions:

Asking the **Right Questions**

- Overall aim is to elicit respondents' **willing**, **comprehensive** and **accurate** answers

- Questions should therefore be:
  - Meaningful
  - Sensitive
  - Precise
  - Searching
  - Salient

Art or Science?

- Questionnaire design traditionally regarded as an art

- No set of principles which can be used **mechanically** to devise questions

- Best practice informed by
  - background reading,
  - talking to people, observing people
  - experienced practitioners
  - *careful piloting*

Checklist No3

- Simmonds (2001) Different categories of information can be obtained from surveys –attributes, behavior, attitudes, beliefs

  - What do you want to find out?

- De Vaus (2002: 94)

  - *"it is crucial to **think ahead and anticipate** what information will be needed to ensure that the relevant questions are asked"*

1) Research problem will affect which concepts need to be measured

2) Indicators we devise for concepts crucial in determining which questions to ask

3) Way data are to be analyzed

4) Way it is to be administered (i.e. CAPI, CASI, CATI etc – computer assisted Personal/Self-Completed/Telephone interview)

Be Careful of Jargon and Technical Expressions

It is best to avoid the use of jargon and technical terms in your survey questions unless you have good reason to believe that all of your respondents are familiar with the terms. As with the use of slang, however, you must then be concerned with how understandable a wider audience will find the results.

There is nothing more helpful than a questionnaire bank! https://ukdataservice.ac.uk/ The UK Data service contains several questions.
I will also create one for this workshop: see practical community survey questionnaire bank.

Concepts are the building blocks of theories or the social constructs

Why **Measure**?

To delineate *fine differences* between **people**, organizations, or any other unit of analysis.

To provide a **consistent** device for gauging distinctions.

To produce **precise estimates** of the degree of the **relationship** between concepts.

Indicators of **Concepts**

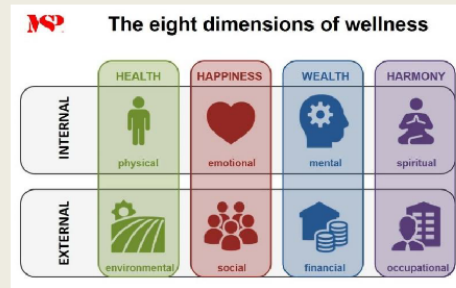Produced by the *operational definition* of a concept

Backed up by a **Measurement** with which you start

Common sense understandings of the form a concept might take

The eight dimensions of wellness

Multiple-indicator measures:

> *Concept may have different dimensions*
>
> *Consider concepts such as **Happiness***

Why use more than one *Indicator*?

- Single indicators may incorrectly classify many individuals (*contentment vs happiness*);

- Single indicators may capture only a portion of the underlying concept or be too general (*financial vs health stability*);

- Multiple indicators can make finer distinctions between individuals;

- Multiple indicators can capture different dimensions of a concept;

Attitudes as Latent Constructs

- **Most variables/constructs in the social world are not directly observable, but we infer their existence by observing indicators**
  - Political attitude (left/right)
    - Do people favour wealth redistribution? Higher taxes? More welfare spending?
  - Social class
    - (job roles, clock in?, weekly/monthly salary etc)
  - Happiness
    - (psychophysical state, laughing a lot, smiling etc)
- This makes them hypothetical or *latent* constructs
- Attitudes are a prime example!
- In questionnaires, use 'indicators' to measure (unobservable) attitudes.

Let's consider several examples of volunteering questions: note that they are very precise – define the period about which the respondent should be thinking and the type of activity.

Behaviours: **Volunteering**

- Volunteering: I'd like you to think about any **groups, clubs or organisations** that you've been involved with during the last 12 months. That's anything you've taken part in, supported, or that you've helped in any way, either on your own or with others. Please **exclude** giving money and anything that was a requirement of your job.

Volunteering

- In the last 12 months, that is, since [DATE ONE YEAR AGO], have you done any of these things, **unpaid**, for someone who was **not a relative**? A list:

1. Keeping in touch with someone who has difficulty getting out and about (visiting in person, telephoning or e-mailing); 2. Doing shopping, collecting pension or paying bills ; 3. Cooking, cleaning, laundry, gardening or other routine household jobs , etc.

- Over the past 12 months, that is, since [DATE ONE YEAR AGO], about how often have you done [this kind of thing/all the things you have mentioned]? 1. at least once a week, less than once a week
- How many hours have you spent doing thins kind of thing in the past 4 weeks?
- Charity

Reasons for not Volunteering

If not volunteering?

- **(1) Here** are some reasons people have given about why they don't give unpaid help to groups, clubs or organisations. Which, if any, of these are reasons why you don't give unpaid help to groups, clubs or organisations?

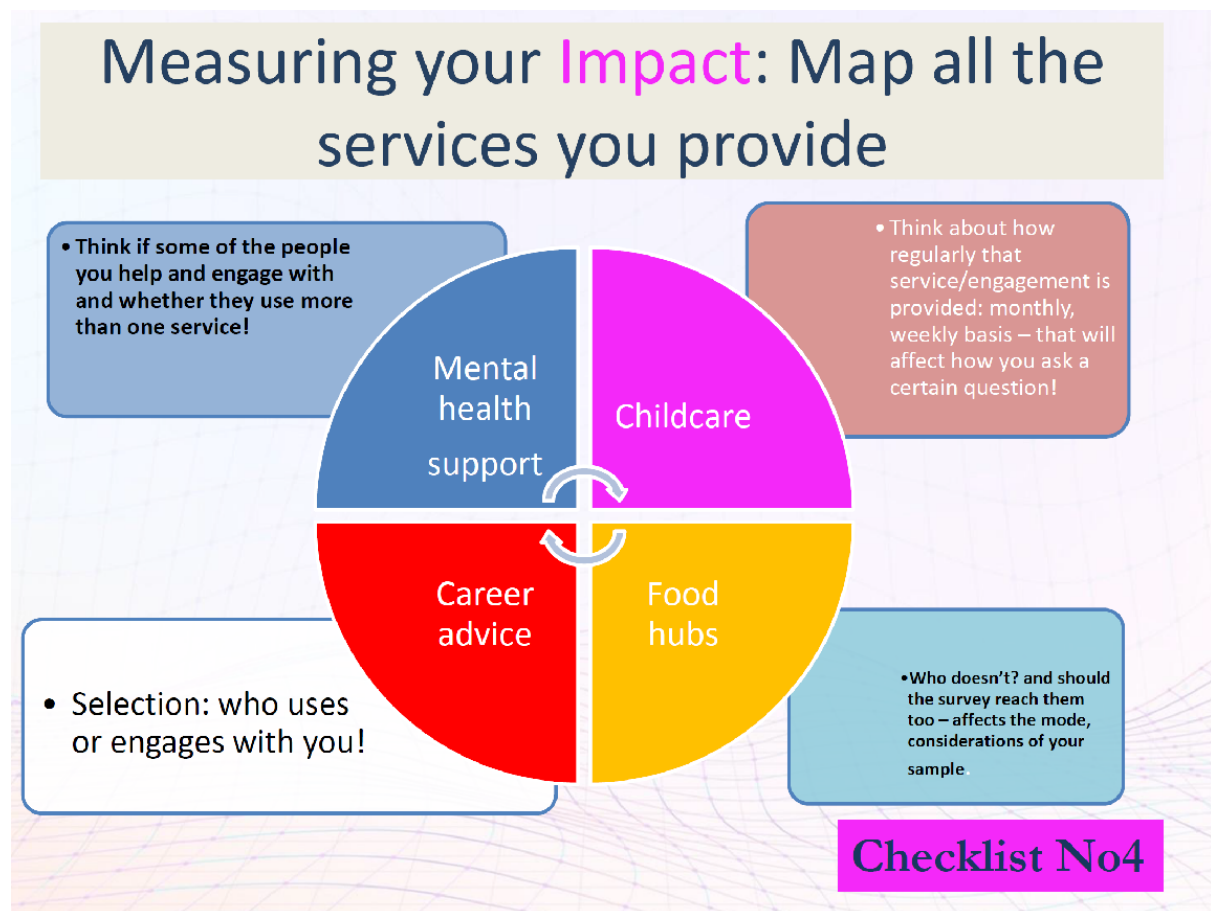*If former formal volunteer use this text:*

- **(2) Here** are some reasons people have given about why they don't give unpaid help to groups, clubs or organisations. Which, if any, of these are reasons why you have not given unpaid help to groups, clubs or organisations in the last 12 months?

If irregular formal volunteer use this text:

- **(3) Here** are some reasons people have given about why they don't give unpaid help to groups, clubs or organisations. Which, if any, of these are reasons why you don't give unpaid help to groups, clubs or organisations more regularly?

If your survey is intended to measure your impact as organization – it will be important to consider all the services you provide (in the circle): mental health support, childcare; then think of who engages with them, the regularity of the service, whether perhaps there are users you are not reaching. This will help you measure your impact as an organization.

Measuring your Impact: Map all the services you provide

- Think if some of the people you help and engage with and whether they use more than one service!

Mental health support

Childcare

- Think about how regularly that service/engagement is provided: monthly, weekly basis – that will affect how you ask a certain question!

Career advice

Food hubs

- Selection: who uses or engages with you!

- Who doesn't? and should the survey reach them too – affects the mode, considerations of your sample.

Checklist No4

How do we measure attitudes?

# Measuring *Attitudes* (and **Beliefs**) in Surveys

- **Likert scales.** Developed by Rensis Likert in the 20s (PhD Dissertation at Michigan)
- *The most frequently used Measure of **attitudes in social sciences***
- **Practical Terms: Respondents are requested to provide an evaluation of a statement, or answer a question, on a pre-coded response scale.**
- Each **scale point** given a numerical value and the respondent is given the '**score**' corresponding to response alternative they select
- Most often a set of Likert items will be **summed** to provide a total score for the attitude for each respondent.

Here are some examples of Likert scales:

Likert Scales

- Strongly Agree, Agree, Neither Agree nor Disagree, Disagree, Strongly Disagree
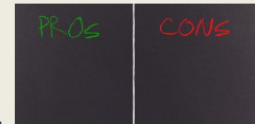
Which of the following **statements** best describes your situation?

*Waiting for decision on benefits and barely making ends meet

*Waiting for decision on benefits but helped by family and friends

Should you include midpoints in your Likert scale?

Midpoints?

Should you include midpoints (**neither/nor**)?

Yes - if there is a genuine midpoint that makes sense (e.g. attitude to capital punishment – undecided? Can see pros and cons.. Etc)
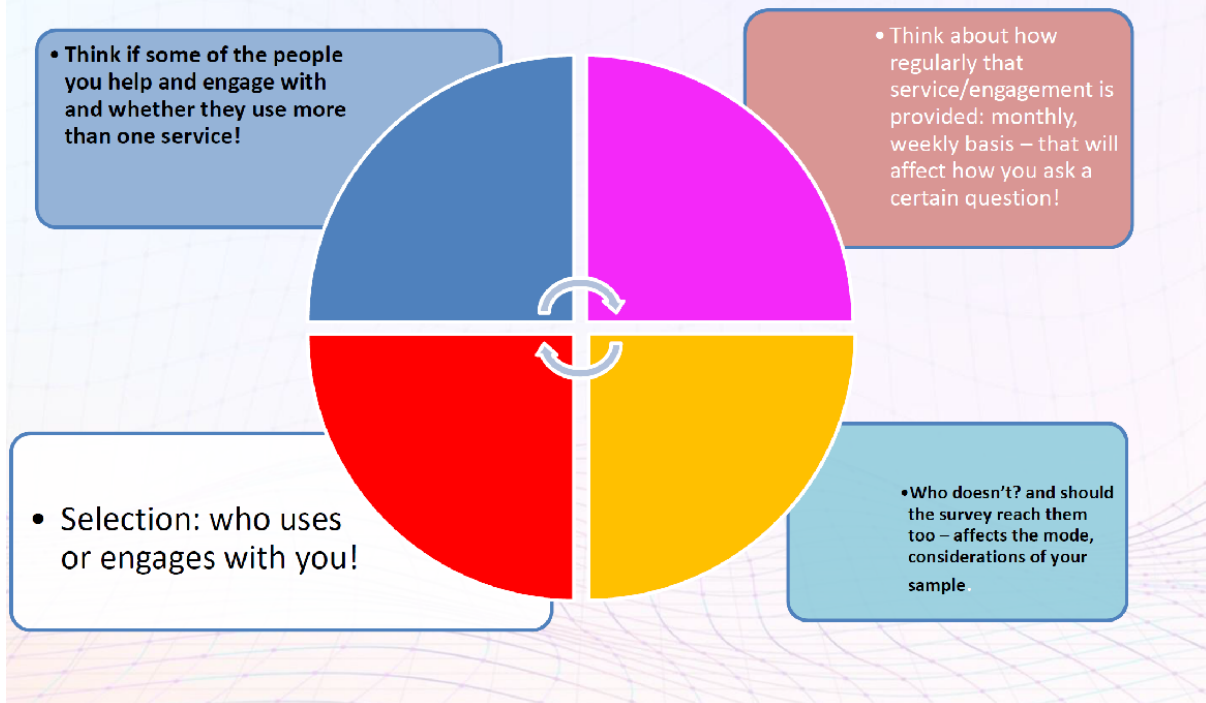
No, if it encourages '**satisficing**' (Krosnick 1991). – *where respondents look for cues that allow them to reduce effort while appearing to answer properly*

Research on this is still inconclusive!

In this point of the workshop, representatives of different organizations were grouped together and were given the following task:

Should your survey include closed or open questions? What are the advantages and disadvantages associated with each?

Closed Questions

- *Advantages*
    - Quick & easy for respondents
    - Less articulate are not at a disadvantage
    - Response choices can clarify alternatives
    - Fewer irrelevant answers
    - Easy to code and analyse
- *Disadvantages*
    - Response alternatives suggest ideas (no knowledge still give an opinion)
    - Frustrates respondents if categories are not exhaustive
    - Misinterpretation goes unnoticed
    - Complex issues forced into simple categories

This is an example of an open question and the type of questions it can generate:

Thinking about your experience with... What are the first three words that come to mind?

How you should evaluate questions to see if they work?

Evaluating Questions

1. Firstly, **try to answer** the question yourself to see if it 'works'
2. **Expert Review** (questionnaire design experts and substantive experts)
3. **Focus Groups**
   Identify words that are not consistently understood etc.: public sector
4. **Cognitive testing** (Willis)
   Think aloud, probing as people answer questions
5. **Behavior Coding** (para-data) (Couper)
   New method – codes interactions between interviewer and respondent e.g. repetition, pauses, side comments

Checklist No5

An example of trying to see whether questions work? Asking respondents to give you an idea of all the associations that come to mind when they are asked this question.

Think Aloud

INTERVIEWER (reading survey question to be tested): **How many times have you talked to a doctor in the last 12 months?**

SUBJECT: I guess that depends on what you mean when you say "talked." I talk to my neighbor, who is a doctor, but you probably don't mean that. I go to my doctor about once a year, for a general check-up, so I would count that one. I've also probably been to some type of specialist a couple of more times in the past year - once to get a bad knee diagnosed, and I also saw an ENT about a chronic coughing thing, which I'm pretty sure was in the past year, although I wouldn't swear to it. I've also talked to doctors several times when I brought my kids in to the pediatrician - I might assume that you don't want that included, although I really can't be sure. Also, I saw a chiropractor, but I don't know if you'd consider that to be a doctor in the sense you mean. So, what I'm saying, overall, is that I guess I'm not sure what number to give you, mostly because I don't know what you want.

(Willis, 1999: 3 [http://fog.its.uiowa.edu/~c07b209/interview.pdf])

Participants in the workshop were asked to evaluate the following questions:

What do you think?!

- *OK, so let's begin to turn us all into expert reviewers!*

Do you agree or disagree with the following:

1) *changes in the workplace and education system do not "filter down" to the family group, and do not produce differences in the gender socialisation process?*

It is important to be considerate of your respondents:

Be considerate of your respondents!

Keep Things Simple if You Can!

- **Complex questions** place greater burden on memory - respondents more likely to forget part of the question
- However, competing need for **clear definition**
  - e.g. "Now think about the past 12 months, from [DATE] through today. We want to know how many days you've used any prescription drugs such as listing…"
- **Shorter probably better on the whole** -although evidence that longer questions can help respondents remember past events – as above

Use Familiar Words/Concepts

- Use **common words** and avoid 'too convoluted' language
  - Eg *main* rather than *principal*; *job-related* rather than *vocational*

- **Concepts**: use in manner in which they are understood rather than in a technical sense e.g. *average*

- Use the language of the respondent not yours!

Avoid/Define **Ambiguous** or **Vague** Concepts

- Common words are often **ambiguous/vague**

- Where ambiguity possible, provide a definition (preferably in the question)
  - Do you regularly travel by bus to work (before COVID)? – by regularly I mean at least once a week?
- **"How worried are you about crime?"… too vague**
  - "During the past week, how often have you worried about… **crime/money**?
    - Your home being burgled? /You and your family going hungry?
    - Being attacked in the street?/Becoming homeless?
    - Having your bank details stolen/That you won't be able to pay your bills
    - Walking alone after dark?
  - Not at all, occasionally, quite often, all the time.

Leading questions invite certain answers by giving cues to the respondent!!!

- How often do you have trouble sleeping?
- Have you heard of the famous writer John Vooslen?
- When did you last borrow money from a friend?
- How often do you use the food hub/food bank?
- When did you stop doing something?
- *Leading questions make respondents feel one answer is more appropriate or likely than another*
- ***This leads to measures that are biased!***

Recalling Events

- Avoid ambiguity ("in the last year")
- **Pin down with exact dates**
  - Has anybody physically attacked you in the past 12 months – that is since February 2002?
  - Did you do any paid work in the 7 days ending last Sunday?
- Tendency to 'telescope' recall
  - Respondents more likely to recall distant events as being more recent than they really are

Keep in mind that social desirability bias can skew the responses of your respondents.

Social Desirability Bias

Definition: Over claiming positive behavior or attitudes; under claiming negative behavior or attitudes; people typically over-report e.g. voting; under report criminal behaviour

- **Under report attitudes thought to be undesirable**
    - E.g. under report racial prejudice, or approval of an unpopular politician (this happened in 1992 election polls)

liKE ME

However there are strategies to minimize social desirability bias:

Minimising Social Desirability Bias

1. **Confidentiality commitment**
2. **Emphasize importance of accuracy (motivation)**
3. Use self-completion (more honesty when interviewer isn't involved)
4. Minimize sense that answers will be negatively valued
5. Introduction: other people approach or casual approach
    1. E.g., 'Many people find it difficult to get out and volunteer, maybe because they are ill or have family commitments. How about you, in the past 12 months, have you volunteered with?
    2. Or: 'By the way, before we finish the interview, can I just check to see if in the last 12 months you have volunteered/voted in the last local elections?'

Avoid double negatives:

Double Negatives

- Often occurs with agree-disagree questions
  - Please tell me whether you agree or disagree with the following statement

    Employers should not make special allowances for….

- Cognitively more demanding to understand what it means to <u>disagree</u> with employers <u>not</u> making special allowances.
- Leads to <u>lack of reliability</u> as people make mistakes in interpretation.

No opinion/Don't know!

- **No opinion filters or 'don't know' option?**
  - **If not there most people will give an opinion**
    - Some studies have asked about fictitious issues
  - But some people genuinely have **no opinion**
  - If there, DK option allows some respondents to select this when they do not have an opinion
  - However, can encourage <u>satisficing</u>
    - Can mean people select DK when they do in fact have an opinion
  - Krosnick concludes that <u>not</u> including filters or DK is best
  - Not everyone agrees.

We next consider the overall structure of the questionnaire:

Overall Survey Structure

- Ok, so we know about **question construction**
- But also think through the *overall questionnaire structure before writing questions (and when evaluating)*
  - Keep questions relating to a **single topic** together
  - Place topics in a logical sequence
  - Logical order or questions within topics
  - Survey interview should be like a conversation

Overall Structure: Question Order

- Start with 'easy' questions which
  - All respondents can answer
  - Are relevant to the survey topic
  - Might be interesting to respondent

- Put **sensitive questions at the end (rapport needs to be built)!**

- Put **demographic** questions at the end or at the beginning!
- Consider filtering – should not be too much!

Types of samples should be considered. Here are some examples of probability samples (random and stratified) and non-probability (volunteer and opportunity)
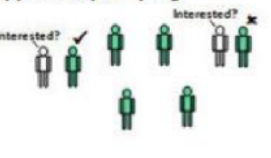
Types of Samples
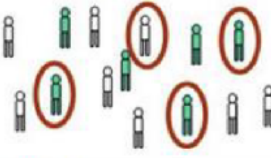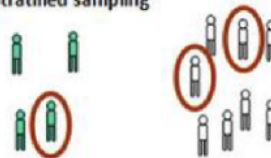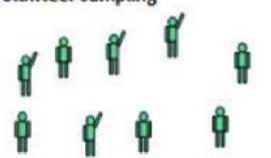
Random sampling	Every member of a population has an equal chance of being selected E.g. Pulling names out of a hat	For very large samples it provides the best chance of an unbiased representative sample	For large populations it is time-consuming to create a list of every individual.
Stratified sampling	Dividing the target population into important subcategories Selecting members in proportion that they occur in the population E.g. 2.5% of British are of Indian origin, so 2.5% of your sample should be of Indian origin... and so on	A deliberate effort is made to make the sample representative of the target population	It can be time consuming as the subcategories have to be identified and proportions calculated
Volunteer sampling	Individuals who have chosen to be involved in a study. Also called self-selecting E.g. people who responded to an advert for participants	Relatively convenient and ethical if it leads to informed consent	Unrepresentative as it leads to bias on the part of the participant. E.g. a daytime TV advert would not attract full-time workers.
Opportunity sampling	Simply selecting those people that are available at the time. E.g. going up to people in cafés and asking them to be interviewed	Quick, convenient and economical. A most common type of sampling in practice	Very unrepresentative samples and often biased by the researcher who will likely choose people who are 'helpful'

Photo credit: McLeod, S. A. (2014). Sampling Methods. Retrieved from www.simplypsychology.org/sampling.html

At this [point in the workshop we had an exercise and considered what is wrong with these questions.

Thank you!

- Further questions about this workshop and feedback:

nvdem@essex.ac.uk

Type in the chat about what you have learnt or gained or if you feel that there are any gaps!